Investigation into the Feasibility of Establishing a National Film School

Towards a National Film Education and Training Strategy for South Africa

arts & culture

Department:
Arts and Culture
REPUBLIC OF SOUTH AFRICA

nfvf

national film and video foundation
— SOUTH AFRICA —

TABLE OF CONTENTS

TOC

TOC

TOC

List of tables

List of figures

AFTRS	Australian Film, Television and Radio School
AMPS	All Media and Product Survey
AR	Audience Review
ASGISA	Accelerated and Shared Growth Initiative of South Africa
BBBEE	Broad-Based Black Economic Empowerment
BFN	Black Filmmakers' Network
CCC	Centro de Capacitacion Cinematographica
CFC	Cape Film Commission
CHE	Council on Higher Education
CIGS	Cultural Industries Growth Strategy
CILECT	Centre International de Liaison des Escoles de Cinema de Television
CPA	Commercial Producers Associations
CSP	Customised Sector Plan
CVET	Community Video Education Trust
DAC	Department of Arts and Culture
DACST	Department of Arts, Culture, Science and Technology
DFO	Durban Film Office
DMWG	Digital Migration Working Group
DOC	Department of Communications
DOE	Department of Education
DOP	Director of Photography
DTI	Department of Trade and Industry
ECA	Electronic Communications Act
EE	Employment Equity
ETDP SETA	Education, Training and Development Practices Sector Education and Training Authority
ETQA	Education and Training Quality Assurance Bodies
FESPACO	Pan African Film and Television Festival of Ouagadougou
FET	Further Education and Training
FPB	Film and Publications Board
FRU	Film Resource Unit
GEP	Gauteng Enterprise Propeller
GFC	Gauteng Film Commission
HCD	Human Capital Development
HD	High Definition
HE	Higher Education
HEQC	Higher Education Quality Committee
HOD	Head of Department
HSRC	Human Sciences Research Council
IBA	Independent Broadcasting Authority
ICASA	Independent Communications Authority of South Africa
ICT	Information and Communication Technology
IDC	Industrial Development Corporation
IMDB	Internet Movie Database
IPO	Independent Producers' Organisation
ITA	Invitation to Apply
JIPSA	Joint Initiative for Priority Skills Acquisition
LSM	Living Standards Measure
MA	Master of Arts
MAPPPSETA	Media, Advertising, Printing, Publishing and Packaging Sector Education and Training

Authority	
MOU	Memorandum of Understanding
NAFTI	National African Film and Television Institute
NEMISA	National Media Institute of South Africa
NFDC	National Film Development Corporation
NFTS	National Film and Television School
NFVF	National Film and Video Foundation
NGO	Non-Government Organisations
NIPF	National Industrial Policy Framework
NLRD	National Learners' Records Database
NQF	National Qualifications Framework
NSB	National Standards Bodies
NSDS	National Skills Development Strategy
NSF	National Skills Fund
QSAPE	Qualifying South African Production Expenditure
RPL	Recognition of Prior Learning
SAARF	South African Advertising Research Foundation
SABC	South African Broadcasting Corporation
SAEF	South African Export Film
SAFACT	South African Federation Against Copyright Theft
SAQA	South African Qualifications Authority
SASFED	South African Screen Federation
SASWA	South African Script Writers' Association
SATBEL	Suid-Afrikaanse Teaterbelange Beperk
SDL	Skills Development Levy
SETA	Sector Education and Training Authority
SGB	Standard Generating Bodies
SIC	Standard Industry Classification
SOC	Standard Occupational Classifications
SSP	Sector Skills Plan
STATSSA	Statistics South Africa
UCT	University of Cape Town
UIP	Universal International Pictures
UNISA	University of South Africa
VOD	Video on Demand
WSP	Work Skills Plan

Foreword by Chairperson of the Research Advisory Panel

The National Film and Video Foundation (NFVF) is proud to present this report on an investigation into the viability of establishing a National Film School. This study seeks not only to discharge the mandate as provided for in section 2 (e) of the NFVF Act No 76 of 1997, but also as a starting point towards a discourse around a National Film Education and Training Strategy for the South African film industry. This study will also inform the development of a strategy for Film Education and Training, something that has not been done for the film industry.

The study commenced in 2006, with an allocation of R2 million from the Department of Arts and Culture (DAC). Since then, a Research Advisory Panel consisting of the Human Sciences Research Council (HSRC), Statistics South Africa (STATSSA), Industrial Development Corporation (IDC), Media Advertising Publishing, Printing, Packaging Sector Education

Ms Charlotte Mampane

Training Authority (MAPPP SETA) and Higher Education South Africa (HESA) was set up in accordance with the NFVF Act. It is unfortunate that one of the stakeholders, the Department of Education, did not participate in this process despite numerous attempts to engage with it.

Currently, higher learning institutions, as well as the education system as a whole, do not adequately provide the film industry with graduates who are equipped with relevant industry skills. Graduates from previously disadvantaged backgrounds still struggle to find employment in their areas of training. Access to private education and expensive education fees remain a barrier for the majority of South Africans, especially previously disadvantaged individuals.

The study confirms that film education and training in South Africa does not meet the needs of the industry in several key areas, and is not coordinated. Certain industry positions have been identified as hard to fill, attesting that there is a need for intervention. Therefore, the film industry and government must develop a film education and training strategy that will ensure graduate absorption and training that meets the needs of the film industry.

The findings of this feasibility study have been released periodically since 2006. The NFVF made an initial presentation of the preliminary findings to the DAC in December 2006. Subsequent presentations were made to the Department of Trade and Industry (dti) and the DAC in October 2008. Comments were also received from these consultations. The NFVF released an abridged version of the study leading to the Film Indaba hosted by the NFVF on 26 and 27 November 2009.

The Minister of Arts and Culture, Ms Lulu Xingwana, called for submissions on 12 October 2009 at a meeting held with stakeholders in the film industry. Concern has been raised around the number of platforms, indicating that consultation on this study has not been broad enough.

A number of stakeholders, including but not limited to government, public and private academics were consulted. The study comprises one part of a multi-prong process, and there is room for further engagement and consultation with stakeholders on other processes that will follow this study.

The NFVF would like to thank all the members of the Research Advisory Panel for their guidance and expertise during this process. We would also like to thank interviewees and respondents who completed the company and individual online surveys. Lastly, our greatest appreciation goes to the training providers and academic institutions who engaged with the Research team.

In conclusion, the NFVF will continue to liaise with the Departments of Arts and Culture, Trade and Industry and Higher Education on taking this process forward. The next step in this process is to conduct a feasibility study on the establishment of a National Film School which will result in the development of a business plan.

Ms Charlotte Mampane
Chairperson of the Research Advisory Board

National Film and Video Foundation Views on the establishment of a National Film School

Mr Eddie Khalipha Mbalo

There are a number of objectives that could be achieved by the establishment of a National Film School. While government has created opportunities in the film industry, access to these opportunities still remains an unattainable goal for the majority of South Africans, especially those from previously disadvantaged backgrounds. A National Film School can assist in the transformation of the industry by not only creating and developing a pool of black practitioners, but also providing training in business skills that are important if the sustainability of businesses in the industry is to be encouraged.

At the Film Indaba, the study and its findings were discussed in a session titled "Human Capital Development and Training for Transformation". This session was attended mainly by training providers. The Film Indaba served as a last consultation forum for the NFVF to engage with the industry on two aspects of the study. These are the findings of the study, as well as recommendations on whether there is a need for the establishment of a National Film School. No consensus was reached with the participants on the need to establish a National Film School. However, it was agreed that there is a need for a national centre for excellence. The South African Screen Federation (SASFED) is of the view that there is no need for a National Film School. The NFVF suggests that SASFED's stance does not necessarily represent a general view or consensus on the issue, but may be driven by private training providers who are protective of their stake in the industry.

Currently, the training of black writers who can operate at the highest level of the industry is imperative given that only eight of the 132 feature films produced locally over the last 15 years were written by this segment. On the same grounds, the training of black directors is also vital. Local producers need training beyond the intricacies of budgeting and scheduling to understand the business of film-making, as well as how to develop business plans for their companies – given that the local film industry often fails to provide products that are successful at the box office. This extends producers' inability to raise sufficient finance for projects in spite of the support provided by the NFVF.

Apart from Anant Singh, there are currently no black producers consistently producing feature films. Some of our local filmmakers make documentaries during the hiatus between projects, and have not made a feature film in years, which suggests that they have not developed a successful business model. Many white producers find themselves in the same predicament. Developing producers through retraining and education is the key to transformation in the industry, both in terms of its demography and its sustainability. This can only be achieved through developing university level programmes that target these weak points.

Eddie Khalipha Mbalo
Chief Executive Officer
National Film and Video Foundation

Executive summary

Purpose

The purpose of this study is to investigate the feasibility of establishing a National Film School for South Africa as required by the NFVF Act. This report explores a number of legislations and government policies that apply to the film and video industries (content industries) and how this sector can be utilised as a vehicle to achieve government objectives of job creation, economic growth and redressing the imbalances of the past. While the brief has been specific to the investigation of the feasibility of establishing a National Film School, the National Film and Video Foundation (NFVF) has extended the scope of the study to lead towards a strategy for National Film Education and Training in South Africa.

Methodology

The study employed both qualitative and quantitative research methodologies. Literature reviews were conducted from previous studies done in the industry. The NFVF research team compiled a database of companies and individuals in the film and video industry using a variety of sources including: The Whole Lot directory, Screen Africa, the Black Filmmakers Network, the Cape Film Commission, the Gauteng Film Commission, the NFVF database and online portal Bizcommunity.co.za.

Two focus groups were held with graduates and students in the film and television industry and face-to-face interviews were held with industry practitioners.

Two questionnaires interrogating the establishment of a National Film School were designed and sent to companies and individuals listed on the collated database. A questionnaire was designed for companies covering the following sub-sectors: film and television production, commercials, corporate videos, post-production, equipment hire and service providers. The objective was to understand industry skills needs, training initiatives, recruitment patterns, views on current education and graduates, and organisations' activities. Another separate questionnaire was designed for individuals in the industry with an objective to understand employment profiles, qualifications, views on training received and challenges faced working in the industry. These questionnaires were also posted on the NFVF website for six weeks.

Secondary data was sourced and analysed from the All Media and Products Survey (AMPS), Television Audience Survey (TAMS), South African Advertising Research Foundation (SAARF), Cinemark, Ster-Kinekor, Nu Metro and United International Pictures (UIP).

A research advisory panel (RAP) was established with representatives from the following institutions: IDC, HESA, STATSSA HSRC, and NFVF.

South African film and television industry profile

- In 1886, six years after Thomas Edison invented the Kinetoscope, the projector arrived in South Africa, marking the birth of the local film industry.

- The first South African film, *The Kimberly Diamond Robbery*, was produced in 1910, and in 1931, the first South African film with sound, *Sarie Marais*, followed, heralding the beginning of the Afrikaner nationalist film.

- In 1956, the government and big business joined forces to introduce a subsidy scheme that rewarded films according to box office success.

- In the 1970s a separate subsidy scheme was awarded to films targeted at the black audience, partly in response to increasing anti-apartheid sentiments. The films, screened in schools, churches and beer halls, largely portrayed black people in stereotypical roles.

- Television was introduced in 1976 after much resistance from the apartheid government that feared it would undermine 'Afrikanerdom' and create an opportunity for the consumption of English-language content.

- In 1986, political activists founded the Film Resource Unit (FRU) to distribute anti-apartheid, educational video material to people excluded from the commercial exhibition sector. The films were made with very limited resources and were later banned and could only be seen outside the country.

- The Human Sciences Research Council (HSRC) undertook a study into restructuring the South African film industry in 1994, which recommended that a statutory body be formed, to administer sustained film funding and development, based on models adopted in countries such as France, Australia and New Zealand.

- The NFVF was established in 1999, the start of a film industry that strives to portray the realities of South Africa today. The NFVF's mandate includes providing funding for development, production, marketing and distribution costs associated with the making of a film. The NFVF also supports training programmes and has given bursaries to 161 students in the period 2001 to 2007.

- The South African film industry consists of three major film exhibitors: Ster-Kinekor, Nu Metro and United International Pictures (UIP).

- By the end of December 2006, there were 89 cinemas and 682 screens across the country operated by Nu Metro, Ster-Kinekor, CC and M@. Of these screens, 61 were digital screens. The majority of cinemas (49%) are located in Gauteng, 20% in the Western Cape, 15% in Kwazulu-Natal and 16% are spread across the remaining six provinces.

- A total of 55 local films were released between 2001 and 2007; an average of eight films per year. These figures represent the major exhibitors (Nu Metro, Ster-Kinekor and UIP) and do not include films released by independent exhibitors.

- Distribution and exhibition industries are still widely dominated by foreign products, particularly American films, and it is estimated that 79% of local screens exhibit commercial American products – leaving South African content to vie with other markets like India and Europe for the remaining 21%.

- Only 5% of the South African population, consisting mostly of high-earners, goes to the cinema. This can be attributed to the closure of cinemas in township areas, the loyal audiences of local television productions and the increasing popularity and sale of DVDs.

- Cinema attendance was on the rise from 2001 to 2005, but has since been on the decline (2006 to 2007). Cinema attendance peaks during school holidays, a trend that occurs annually.

- The government, through the NFVF, IDC and DTI, is the chief investor in local film and television production and has introduced incentives to support growth and development of film and video industry.

- The Rebate Scheme was introduced in 2004 with a three-year budget of R252 million. The scheme is administered by the DTI.

- Two provincial governments (Gauteng and the Western Cape) and the EThekwini metropolitan council in KwaZulu-Natal have established film commissions to provide support to filmmakers. The Eastern Cape, Free State, Mpumalanga and North West provinces are at various stages of formally establishing film commissions.

- South Africa has so far entered into four co-production agreements with Canada (1997), Germany (2004), Italy (2003), and the United Kingdom (2006) aimed at providing a framework that enables and encourages collaboration between South African producers and treaty co-producers. Negotiations are currently underway with Ireland, Australia, France and New Zealand.

- Between 1997 and 2007, South Africa concluded a total of 28 co-production projects to the value of R1,357,548,492. Most of these co-productions were out of the SA/Canada treaty.

- The government's Accelerated and Shared Growth Initiative for South Africa (ASGISA) identified the film industry as a sector with excellent potential for growth, contributing to the economy and creating jobs.

Profile of survey respondents

1. Companies

- The majority of respondents (18%) were film and video production companies, 17% television production companies, 16% film and TV production companies, 11% commercials production companies and 9% corporate videos production companies.

- Over two-thirds (67%) of companies had a secondary business activity ranging across sales and marketing, crewing and casting agencies, legal services, training and events or locations.

- The industry is dominated by companies employing less than 10 people. Over three-quarters of companies (79%) employed between one and nine people, 20% employed between ten and 49 people and only 1% of companies employed between 50 and 250 people.

- One-third (33%) of companies were established between 2000 and 2004, 27% before 1994, 21% between 1994 and 1999 and 18% were established between 2005 and 2007.

- The majority of companies (55%) are registered as close corporations, 29% as private companies, 2% as sole proprietors and 1% as partnerships.

- The majority of companies (48%) have their head office in Gauteng, 29% in the Western Cape and 6% in KwaZulu-Natal. The rest are spread across the remaining provinces.

2. Individuals

- Whites accounted for 49% of respondents, blacks 36%, coloureds 10% and Indians 6%.

- The industry is still widely male-dominated with the majority of respondents (79%) male and 21% female.

- Few respondents (6%) indicated they have a disability.

- The majority of respondents (60%) are younger than 36 years of age and 14% are over the age of 50.

- More than half of respondents (57%) reside in Gauteng, 30% in the Western Cape, 8% in Kwazulu-Natal, 4% in Limpopo and 2% in Mpumalanga.
- More than one-third (39%) of respondents are working as freelancers, 23% have permanent contracts and another 23% are working without a signed contract.

- Just over half (55%) of respondents indicated they do not own production companies while 45% indicated they own production companies.

Education and training, skills development and skills needs

- The Higher Education Act was introduced in 1997 to ensure that all South African citizens, despite their race, have equal access to better quality education that advances the personal, social and economic development needs of a democratic South Africa.

- Tuition fees ranged from R11 000 to R20 000 per annum at public institutions and R40 000+ per annum at private institutions in 2007.

- Some respondents view the public institutions' curriculum as more theoretical than that of their private counterparts, which was perceived as being more practical.

- The majority of companies (57%) have no preference for institutions when recruiting graduates, while 43% prefer graduates from certain institutions, stating that those institutions give students access to the industry.

- Some respondents regard current film and television higher education irrelevant and far removed from the realities of the industry, and prefer to work with people who have passion for the industry and show initiative. They regard new graduates as unprepared for employment, having little or no knowledge of the industry and in need of more training relevant to the industry. Some respondents prefer to employ people with an academic background and a solid grasp of the theory of film-making, as opposed to trainees from learnerships, who have only completed secondary education.

- The management of skills development is mainly regulated by the following laws aimed at improving skills development in SA: the South African Qualifications Authority Act 58 of 1995, the Skills Development Act 97 of 1998 and Skills Development Levies Act 9 of 1999.

- 25 Sector Education and Training Authorities (SETAs) were established in 1998 to manage the skills development process by strategically partnering with critical role-players and stakeholders in particular economic sectors, ensuring that the national skills pools adequately supply industry demands.

- Each SETA is required to develop a Sector Skills Plan (SSP) which ensures that they have relevant and up-to-date information and analysis to allow them to perform strategic planning. The SSP monitors supply and demand for labour within the sector to ensure that there is no mismatch between supply and demand of skills, and also identifies opportunities and constraints on employment growth within the sector. The SSP also guides the allocation of resources, including the National Skills Fund, discretionary grants, bursaries and other grants under the Skills Development Levy.

- The film and electronic media sector is supported by the Media, Advertising, Printing, Publishing and Packaging (MAPPP) SETA.

- The MAPPP-SETA Sector Skills Update 2006/2007 estimates that the sector provides full-time employment for 71 000 practitioners, 8% (5 680) of whom fall within the Film and Electronic Media sub-sector. This figure is based on analysis of employment data from companies that submitted workplace skills plans (WSPs) to the SETA.

- The majority of respondents (68%) indicated they are not registered with the MAPPP-SETA and 78% indicated they do not have a Skills Development Facilitator, as most are one-man companies.

- The majority of respondents (80%) experienced skills shortages across all occupations in 2006 and there is high demand for personnel from previously disadvantaged backgrounds.

- Producing, Screenwriting, Head of Departments, Editing, Animation and Cinematography were listed by respondents as occupations that were hard to fill in 2006. Half of respondents (50%) attributed this to inadequately experienced personnel. A further (30%) accredited it on the generally low quality of skills in the industry and (15%) cite crewing rates, as personnel who have the needed skills charged higher rates.

- To address skills needs, 83% of companies facilitated training in the form of learnerships, mentorship, internships, short courses and train-the-trainer programmes. The remaining 17% did not facilitate training, citing the following reasons: training is expensive, they do not have enough time to train, do not know how to access training opportunities, there is no relevant training, their staff are fully proficient and that training has not had any impact on performance in the past.

- Respondents listed experience and skills as the major determining factors in landing a job in the industry, followed by good references, production requirements and the production budget, in that order. They commented that formal film qualifications, compliance and contractual issues only played a minor role in securing employment in the film and video industry.

- Employers are of the view that graduates expectations for salaries and management positions are too high, and often not willing to start at the bottom and work their way up.

- Some respondents felt there is too much entry-level training that does not meet industry needs, while mid-level practitioners are not offered training to improve their skills and keep up with technological developments.

Graduate absorption and career advancement

- The majority (65%) of respondents indicated that they are employed in the film and television industry, as opposed to 35% who are unemployed and were seeking employment in the industry at the time of the survey.

- Reasons given for unemployment range from being in-between productions to not knowing the right people or having experience.

- Less than one-third (28%) of respondents mentioned that they have been employed in their current positions for over 10 years and 14% indicated they've had their current positions for less than a year.

- Over one-third (37%) of respondents indicated that they'd recently worked on a TV production, 20% on short film, 10% on a commercial and 8% indicated they had recently worked on a documentary, feature film and an international production.

- More than half of respondents (61%) heard about their last job through word-of-mouth, leaving little opportunity to enter the job market without previous work experience, a recommendation by your training institution or the relevant industry links. Very few (2%) respondents indicated that they use crewing agencies.

- The ad hoc nature of the industry and the scramble for work, often any work, makes it difficult to plan a career path.

- New graduates able to enter the industry are often frustrated at working in the same position for a long period, without being able to pursue what they specialised in, in their studies, or fulfil their aspirations.

- More than half of respondents (58%) indicated they did not work outside the film and video industry, while 42% indicated that they had other work outside of the industry.

- Other respondents (30%) listed irregularity of income as the biggest challenge of working in the industry.

- Nearly half of the respondents (44%) indicated that they received training in 2006 in the form of mentorship, 28% in the form of skills programmes, 17% in the form of short courses and 6% in the form of internships.

- Of the 56% of the respondents who indicated that they had not received training in 2006, some indicated there was a lack of relevant training as the courses offered were of poor quality. Some indicated they did not have enough time to go to training. Others indicated that they'd not had information about training, and some were of the view that training is too expensive.

- A fair number of respondents (42%) indicated that on-the-job training or mentorship would be the most relevant training for them; 32% felt that after-hours short courses would be relevant and 4% felt that learnerships would be better for them.

Views about the establishment of a national film school

- The majority of respondents (76%) are of the view that a National Film School should be established.

- Of those, 52% indicated they could support the school by offering practical work experience to students, 28% by offering placements for graduates from the NFS, 13% by offering staff to train at the NFS and 7% could provide trainers for the NFS.

- Some of the respondents (19%) indicated they will support a National Film School that has trainers who have film and television experience, 14% if it has links with the international film community, another 14% if it has state-of-the-art equipment, 13% if it has a curriculum that offers highly practical component and 12% will support the school if it produces graduates who have practical experience.

International benchmarking and recommendations

- Australia, United Kingdom, USA, Mexico and Ghana were selected for best practice models as they have flourishing film schools that have contributed towards growth and development of the industry within their respective countries.

- The chosen schools are either fully funded by the state or, in addition to the state, are funded in partnership with the private sector.

- The study recommends the establishment of National Film School which will be funded by both the private and public sector with the DAC and DTI playing a critical role.

- The school has to address both the technical and theoretical needs of the industry and should have strong links with the industry.

- Student admission to the school should be based on passion to be in the industry and not only on academic excellence, while taking into consideration the financial needs of the applicant. Membership of international bodies such as CILECT is also recommended.

In March 2006, the Department of Arts and Culture (DAC) approved the budget for a feasibility study for the establishment of the National Film School. The budget is to enable the NFVF to investigate the viability of establishing a National Film School in collaboration with the Departments of Education (DOE) and Trade and Industry (DTI). The study will investigate the degree to which current education and training resources meet the needs of the South African film industry. The results of the research will provide the necessary knowledge base to determine an appropriate strategy for film education and training and the feasibility of establishing a National Film School.

1.1 Background

The NFVF is a statutory body mandated by the NFVF Act of 1997 to ensure the growth and development of the South African film and video industry. The goal of the institution is to create an environment that develops and promotes South African film and video, both locally and internationally. The NFVF's objectives include to:

- Develop and promote the film and video industry.

- Provide and encourage the provision of opportunities for persons, especially from disadvantaged communities, to become involved in the film and video industry.

- Encourage the development and distribution of local film and video products.

- Support the nurturing of, and access to, the film and video industry.

- Address historical imbalances in the infrastructure and distribution of skills and resources in respect of the film and video industry.

- Promote the development of South African film and television audiences.

- Facilitate the export of South African film and video products and talent.

1.2 Aims and Objectives

The overall purpose of the research is to provide a quantitative and qualitative picture of the current skills needs of the film industry in South Africa. This will be based on the present capacity of the industry. Another purpose is to assess the degree to which current education and training initiatives meet these needs. It should also project future growth potential, to enable the identification of future skills gaps and gaps in training provision. The research, to be carried out as part of this investigation, will assist the Council of the NFVF, the DTI and DOE to assess the need for a National Film School, to identify better-practice models and to propose a suitable model for the National Film School, given industry and training contextual factors.

The outputs of the research process, policy implications and recommendations will be documented and presented at the National Film Indaba, where a final set of recommendations will be presented to the Minister of Arts and Culture, for a final determination before submission to Cabinet. In addition, because of the obvious link between this research and the requirements for a baseline study to determine the future human capital requirements of the industry, the research will inform the development of the sector skills plan for the MAPPP SETA.

1.3 Research Methodology

The study employed both qualitative and quantitative methodologies. Various techniques were used for data collection, including face-to-face interviews with practitioners, focus groups, and an online survey. The starting point was creating a database from a wide range of sources including: Whole Lot directory, Screen Africa, Black Filmmakers Network, Cape Film Commission, Gauteng Film Commission, the NFVF internal database and online portal Bizcommunity.co.za.

This was followed by structured person-to-person discussions with representatives of industry associations. Further industry consultations were held with practitioners. In conjunction to this, literature reviews were conducted from previous industry studies.

For the education and training section, focus groups were held with graduates and students in the film and television industry. Two questionnaires were designed for companies and individuals. These were posted on the NFVF website for six weeks. The sample distribution of respondents is displayed in the table below.

Table 1: Respondents

Survey Group	Number of Respondents	Percentage (%)
Face-to-face Interviews	62	25%
Individual Online Survey	67	27%
Company Online Survey	106	43%
Focus Group 1	4	2%
Focus Group 2	5	2%
Total	**244**	**100%**

Secondary data was sourced and analysed from the following institutions:

- All Media and Products Survey (AMPS)
- Television Audience Survey (TAMS)
- South African Advertising Research Foundation (SAARF)
- Cinema Reports (Cinemark)
- Films released in South Africa (Ster-Kinekor, Nu Metro and United International Pictures)

A research advisory panel (RAP) was established with representatives from the following institutions: Industrial Development Corporation (IDC), Higher Education South Africa (HESA), Statistics South Africa (STATSSA), Human Science Research Council (HSRC), and the National Film and Video Foundation (NFVF).

1.4 Methodological Challenges

- Industry consultations that will inform the standardisation of skills requirements depend on the level of bias from individuals within the industry.

- Curriculum-based skills outputs vary among all training providers, with some biased towards technical skills and others towards academic skills, resulting in a lack of synergy as to what skills each occupation requires, within the training sector.

- Membership of some organisations is limited and not sufficiently representative of the specific sub-sectors.

- The large number of freelance and contract workers prevalent posed a difficulty in painting a realistic picture of the industry.

- The literature review that led to the preliminary industry consultation revealed that existing secondary research into the South African film industry and film education and training is outdated and superficial in parts. In addition, the methodologies and results were too disparate to construct a reliable baseline of the audiovisual industry. [1]

- There is difficulty in incorporating existing research because national occupational definitions from Stats SA (Standard Industry Classification codes) and the Department of Labour (occupational codes) are incongruent with each other and the occupations and terms used in the audiovisual industry.

- Regarding the accuracy of available data, the methods employed to collect this data were inconsistent, and the research results not comparable.

- There is no standard model for calculating multiplier effects and no clear indication as to which tools to use.

- Stats SA and the Department of Labour definitions also exclude some activities of the audiovisual industry.

- There were difficulties in fulfilling the requirement of conducting a longitudinal graduate absorption study based on the 2004 Graduate Perspectives Study, as the NFVF has not been able to access it.

Chapter 2:
South African Film and Television Industry Profile

2.1 Introduction

This chapter provides an overview of the film and television industry with specific focus on transformation, legislative framework within which the industry operates, the role of stakeholders and research studies undertaken.

2.2 Historical Background of Film and Television Industry

In 1892, the first projectors arrived in South Africa, marking the birth of the local film industry. The projectors were used to screen newsreels from Britain and America and later showed footage of the Anglo-Boer war.

By the time the apartheid government came into power in 1948, Afrikaans language films had gained popularity and were proving to be an effective tool for nationalist propaganda. From that period, films were used as vehicles to transmit nationalist ideals.

In 1974 a subsidy scheme known as 'Subsidy B Scheme' was awarded to films targeted at the black audience made by their white counterparts, partly in response to increasing anti-apartheid senti-ments, and was seen as an incentive for white film-makers. [2] The requirements to qualify for this subsidy were minimal and no emphasise was placed on quality and content. These 'Bantu' films made by white filmmakers and the few made by black filmmakers, were very formulaic. [3]

Sanlam acquired Sterfilms, creating the Suid-Afrikaanse Teaterbelange Beperk (SATBEL). SATBEL specialised in the funding, production, distribution and exhibition of Afrikaans language films. SATBEL eventually acquired the dominant American company, Fox, to form Ster-Kinekor, [4] gaining control over the South African film industry value chain. The South African audience was subsequently isolated from the international film arena. [5]

Television was first transmitted in 1976, after much resistance from a government that feared the demise of 'Afrikanerdom'. The introduction of television caused a massive slump in the film industry due to two reasons: audiences were enticed by the quality of programming on the small screen and the costs of raising film production value to the standard of television content were phenomenal.

A new wave of anti-apartheid films made by independent filmmakers rose in the 1980s. Their aim was to showcase the reality of the political situation in South Africa. These films were largely funded by foreign non-governmental organisations (NGOs) or by the independent filmmakers themselves. It was through these initiatives that political activists founded the Film Resource Unit (FRU) in 1986, to distribute anti-apartheid and educational video material to people excluded from the commercial exhibition sector.

These films were made with very limited resources and were later banned in South Africa.

In 1986, the state-controlled SABC's monopoly came to an end, with the establishment of a subscription channel, M-Net. The new channel offered international content that was more current and of higher quality, attracting a large white, middle-class viewership.

---

[2] De Barros L. "An assessment of the emerging independent film making in the Gauteng Region". Downloaded from the Showdata website.
[3] Black filmmakers, such as Nana Mahomo, Gibson Kente and Simon Sabela, who attempted to make more meaningful films, were also censored and denied subsidies.
[4] Ster-Kinekor is now owned by Primedia, and remains one of the most dominant distribution and exhibition companies in South Africa.
[5] Botha, M "100 years of South African Cinema" (1998). Available on http://kinema.uwaterloo.ca/kfall06.htm.

2.3 Current Situation in South Africa

In 1994, the Department of Arts, Culture, Science and Technology (DACST) was established.

In 1995 DACST embarked on a process of restructuring the South African film industry and further investigating ways and means to contribute towards the development and growth of the sector. [6] In 1996, DACST published the Film Development Strategy, which acknowledged that film is a high risk industry, and that in many countries, the state supports this industry for cultural and investment reasons. [7] The Film Development Strategy recommended among others, the establishment of the NFVF, which was formed after the Act. [8] The establishment of the NFVF has been seen as the primary mechanism for government assistance in the development of the film and television industry, while the NFVF has been regarded as the key institution in coordinating and promoting the film industry. [9] The creation of DACST and Film Development Strategy fostered the emergence of new, diverse voices and signalled a move towards a more representative film industry.

A number of interventions that followed further nurtured these new and diverse voices. In 1995, M-Net's short film competition, New Directions, was introduced. It produced pioneering filmmakers who continue to create numerous projects that have successfully participated on the international film festival arena. With the support of the NFVF and the IDC, several feature films have been produced and released theatrically. Some went on to receive major international accolades, such as the Oscar-nominated *Yesterday* and the Oscar-winning *Tsotsi* (2005). *Drum* received prestigious accolades at Panafricanfilm and Television Festival of Ouagadougou.

Today, the South African cinema audience consists of a small fraction of the population that mostly supports well-marketed Hollywood blockbusters. There are a number of reasons that can be attributed to this. For instance, cinemas in the townships have closed down. The majority of the South African population is excluded from the film industry owing to historical imbalances i.e. lack of access to cinemas and high ticket prices. Audience development programmes, administered by organisations like the Film Resource Unit (FRU) and the Community Video Education Trust (CVET) have not been able to reach a mass audience. This results in South African films not being able to recoup their costs locally, while others enjoy success mostly at international film festivals.

2.4 Policy and Legislative Framework of the Film Industry

Government through its three spheres (national, provincial and local government) has developed a number of policies that seek to determine the impact of film in the South African economy and government initiatives. This section outlines the mandates and roles of government departments and its agencies in the following areas: development, production, funding, promotion, regulation and the preservation of South African film.

2.4.1 Cultural Industries Growth Strategy (CIGS)

The CIGS is the first policy that provided the South African government with a framework and macroeconomic strategy informing government activities and policies with regard to the cultural industries. The CIGS was developed in 1998 after the emergence of the information economy which indicated that a country's competitive advantage was to be based on its human capital, creativity, innovation, and knowledge. [10] The South African government identified the new global economy change as having a significant potential for growth and development in the South African economy. The CIGS maps out the economic impact that

---

[6] PriceWaterhouseCoopers Profile 2000 ,(2000) p 6.
[7] Ibid.
[8] Ibid.
[9] Ibid.
[10] http://www.info.gov.za/speeches/1998/98c09_0w6399811508.htm.

the cultural industries, namely film, craft, music and publishing, have on South African socio-economic development. CIGS identified the cultural industries as having the potential to drive the new economy by generating innovative and creative human capital. It was noted that the development of these sectors would require a collaborative approach between the public and private sectors. [11]

According to CIGS, in 1998 the South African entertainment industry was valued at approximately R7,4 billion and employed an estimated 20 525 people. [12] Film and television is worth R5,8 billion of this and has a strong technical base of skills and infrastructure. [13]

The industry generates jobs in production and post-production companies, casting and crewing agencies, equipment-hiring companies, set design, manufacturing companies and prop suppliers. Jobs are also created indirectly in supporting industries such as the hospitality industry. [14]

2.4.2 Micro Reform Strategy

In May 2002, Cabinet approved the Microeconomic Reform Strategy (MRS). The aim of MRS is to remove the obstacles that impede microeconomic growth. [15] The strategy represents an integrated action plan that focuses on addressing microeconomic constraints to growth. [16] The action plan has three economic sub-divisions composed of the Cross Cutting Sector (technology, human resources development, access to finance and infrastructure), Input Sector (transport, energy and telecommunications) and Prioritising Growth Sector (exports, tourism, agriculture, cultural industries and the ICT). According to the Standard Industrial Classification (SIC), the film industry straddles the hospitality, transport, warehousing and communications subcategories of the economy. [17] Film falls under the Input Sector and Prioritising Growth Sector in terms of MRS.

The MRS also identified five sectors of the economy (which includes film) that have considerable potential for increased employment creation, to receive focused attention from the state. In each sector, programmes will include a specific focus on employment generation, value addition, export growth, small business development and Black Economic Empowerment (BEE). In relation to film, actions that will be undertaken include improved access to finance for small business, improved training in cultural industries, the use of technology to improve competitiveness of the sector, and strategy on South African audio visual services.

2.4.3 Strategy for the Development of Content Industries

In 2003, Cabinet approved the strategy for the development of content industries including film, broadcasting and multi-media in South Africa (the Content Industries Strategy). The strategy was a joint initiative by the Departments of Arts and Culture (DAC), Trade and Industry (DTI), Communications (DOC) and the NFVF. The strategy committed funding to research and development, content production, marketing and distribution, human capital development, and institutional development. Film is acknowledged as a concurrent competency of the above-mentioned departments. It aims to achieve, inter alia, sustainable growth and development, global competitiveness, job creation, economic growth and cultural representativity. [18]

---

[11] Ibid.
[12] Cultural Strategy Group on behalf of DACST 'Creative South Africa' (November 1998), p 21.
[13] Ibid.
[14] Ibid.
[15] Wendy Dobson 'A guide to the microeconomic reform strategy' (May 2002), p 3.
[16] Ibid.
[17] National Film and Video Foundation, 'Value Charter' (2004).
[18] Department of Arts and Culture, *"Strategy for the development of content industries: film, broadcasting and multimedia in South Africa"* (2002).

The strategy has identified six key areas of focus to drive the industry forward as follows:

- Showing that the industry is a significant contributor to the country's GDP.
- Government contribution and role in the growth and development of the industry.
- Policy regulating the content industry.
- Co-productions.
- Government incentives.
- Institutional capacity

The DTI, NFVF and DOC have been allocated R115 million, R160 million and R195 million respectively according to the approved request for funding to implement the Customised Sector Plan (CSP). [19]

2.4.4 Accelerated and Shared Growth Initiative of South Africa

Government's current initiative for economic growth, the Accelerated and Shared Growth Initiative of South Africa (ASGISA), identifies cultural industries as one of the key sectors that can provide job creation and economic growth, given the labour-intensive nature of film production. [20] ASGISA identifies a set of six categories of initiatives, in response to binding economic constraints of macroeconomic infrastructure, sectoral and industrial strategies, skills and education, second economy and public administration.

2.4.5 Black Economic Empowerment

Since 1994, Black Economic Empowerment (BEE) has been a major thrust of all government policies. The absence of a coherent strategy towards the implementation of BEE undermined wide spread realisation of the policy objectives as intended by government. [21] In 2003, a strategy for Broad-Based Black Economic Empowerment (BBBEE) was developed by the DTI. According to the DTI, BBBEE is 'an integrated and coherent socio–economic process that directly contributes to the economic transformation of South Africa and brings significant increases in the number of black people that manage, own and control the country's economy, as well as significant decreases in income inequalities. [22]

While other sectors such as mining, constructing and finance have developed sector-specific transformation charters, the film industry has not yet established its own charter. This is a missed opportunity as the film industry has a long way to go to achieve real transformation.

2.4.6 National Film and Video Foundation Act 73 of 1997

The NFVF's main objective is to develop a sustainable industry by breaking down barriers of entry in the film industry and allow persons from previously disadvantaged communities to participate in the industry. As indicated in earlier sections, the film industry was built around racial lines to the exclusion of black people in many areas of the industry value chain.

The NFVF, through the objects of the Act as contained in Sections 3 and functions as set out in Section 4, is given a number of specific objectives to redress past imbalances. These

---

[19] NFVF Business Case and Business Plan for the implementation of programmes (2008), pg 11.
[20] Accelerated and Shared Growth Initiative for South Africa. Office of the Deputy President, Treasury, DTI, DPLG (Department of Provincial and Local Government, DPE (Department of Public Enterprise), SALGA (South African Local Government Association). 2004. http://www.info.gov.za/asgisa/asgisa.htm#strategies
[21] DTI Codes of Good Practice For Broad Based Economic Empowerment, p 1.
[22] Ibid

include, among others, to develop and promote the film industry, to provide and encourage opportunities for persons from previously disadvantaged communities in the film industry and to encourage the distribution of local film and video products. [23]

In order for the NFVF to realise its objectives, the NFVF Act has set a number of functions towards their achievement. These include, rendering of financial support to any person or any organisation, providing training, conducting research into any field of the film industry, maintenance of databases of persons, organisations and institutions, advising the Minister of DAC on matters concerning the film and video industry and liaising with the Communications regulator to encourage the use of local content programmes on television. [24]

2.4.7   The Cultural Laws Amendment Act 36 of 2001

The Cultural Laws Amendment Act provides for all the amendment of cultural laws in South Africa under the auspices of the DAC.

The main amendments to the NFVF Act were introduced in 2001. Section 22 of the NFVF Act as amended by the Cultural Laws Amendment Act, empowers the NFVF to establish a separate legal entity for purposes of investing in film and video projects and to provide for the submission by the Council of a business plan to the Minister.

2.4.8 The Lotteries Act No 57 of 1997

The National Lotteries Board and its distributing agency derives its mandate to fund film development from Sections 27, 30, 32, and 34 of the Lotteries Act. Section 27 in particular, deals with matters of Reconstruction and Development Programme (RDP) funding. In the case of film, RDP initiatives concern the subsidisation of institutional reforms, organisations, and projects.

Section 30 of the Lotteries Act Regulations provides for requirements for the allocation of funds for Art, Culture and National Heritage. The NFVF complies with the requirements stipulated in the regulations. [25]

In 2004, the National Lottery Distribution Trust Fund issued a call for funding application from the Charities, Arts, Culture and National Heritage categories. [26] The focus for Arts and Culture was on organisations whose activities addressed the production and promotion of cultural products and/or performance; education, training and skills transfer; and the building of new audiences and increasing public access to the arts. [27] In 2004, the fund allocated R375,383,838 to 287 beneficiaries in the Art, Culture and National Heritage category. [28] The film industry as a whole has not benefited from the fund as allocations have only been made to few individuals in the industry.

2.4.9   Classification of Films

The objective of the Films and Publications Act 65 of 1996 is to regulate the distribution of certain publications and the exhibition and distribution of certain films, by means of classification, imposition of age restriction and consumer advice, with due regard to the fundamental rights.

---

[23] National Film and Video Foundation Act 73 of 1997, section 3 (a), (b) and (c)
[24] Ibid, section 4 (1) (a), (d), (e), and section (4) (2) (a) and (g)
[25] Section 30 of the Lotteries Act Regulations.
[26] National Lotteries Board, Annual Report (2004), pg 13.
[27] Ibid.
[28] Ibid, pg 14.

Section 26(1) (d) states that any person who knowingly exhibits in public or distributes a film without having been registered with the Board, as an exhibitor or distributor of films, commits an offence. In addition to the above, section 26(1) (a) provides for another offence, which is committed by knowingly exhibiting in public or distributing any film that has not been classified by the Board, or has been classified as XX in terms of the decision of the Board, as has been published in the Gazette. Films for theatrical and DVD release must be classified by the FPB before they are distributed in South Africa. Broadcasters have developed their own classification systems and also comply with a Code of Conduct for Broadcasters enforced either through self regulation or by the communications regulator.

2.4.10 Copyright

The Registration of Copyright in Cinematograph Films Act 62 of 1977 governs the copyright registration of cinematograph films. Original cinematograph films are works that are eligible for copyright protection under the provision of the Copyright Act 98 of 1978. [29] A cinematograph film is defined in Section 1 of the Copyright Act as "any fixation or storage by any means whatsoever on film or any other material of data, signals or a sequence of images capable, when used in conjunction with any other mechanical, electronic or other device, of being seen as a moving picture and of reproduction, and includes the sounds embodied in a sound-track associated with the film, but shall not include a computer program".

In terms of Section 8(1) of the Act, copyright in a cinematograph film vests the exclusive right to do or to authorise the doing of a variety of acts in relation to a film. This includes reproduction of the film, the making of still photographs, causing the film to be seen and causing the soundtrack of the film to be heard in public, the broadcasting of the film, making an adaptation of the film and/or letting out copies of the film. [30] The author or creator of film may hold ownership of copyright in a film. An author, in relation to a cinematograph film, means the person by whom the arrangements for the making of the film were made, [31] and, in relation to a broadcaster, means the first broadcaster. [32] However, where the author was commissioned by a broadcaster to make a film, the broadcaster would own the copyright to the film. [33] South African broadcasters use this provision to hold all rights in commissioned work, a practice which is criticised as not empowering independent local producers.

2.4.11 Preservation of Local Content

The independent Communications Authority of South Africa (ICASA) has powers to prescribe regulations to ensure that local programming is preserved. [34] Section 61 of the Electronic Communications Act of 2005 provides for the preservation of South African programming. To that end, ICASA, in terms of Subsection 1, may prescribe regulations regarding the commissioning of independently produced South African programming.

In addition, Section 61(3) states that the authority may, in respect of television broadcasting service licensees, impose and specify in those licences such conditions prescribed, regarding local television content and independent television production.

Local television quotas were first introduced in May 1997 and came into effect in November 1999. [35] The NFVF and ICASA play an important role, mandated in their respective legislation, to promote the production of local content. Section 4(2) (g) of the NFVF Act provides that

---

[29] Section 2(d) of the Copyright Act 98 of 1978.
[30] Ibid Sec 5(4).
[31] Ibid Sec 1(d).
[32] Ibid Sec 1(e).
[33] Ibid 21(d).
[34] Electronic Communications Act No 36 of 2006, section 61(1).
[35] ICASA Discussion Paper on the Review of Local Content Quotas, December 2000, p 3 available on www.info.gov.za/otherdocs/2000/icasa.pdf

the NFVF must liaise with ICASA, to encourage the use of local content programmes on television.

2.5 Government Incentives and Support Programmes for Film

Government has introduced a number of programmes to support the production of local films and television programmes. Its financial support operates across the three spheres of government mentioned in paragraph 2.3.

At national level financial assistance and government incentives are carried through government departments and agencies such as the NFVF, DTI, DAC and IDC. At provincial level, it is carried out through the film commissions and development agencies. At municipal level it operates through film offices.

2.5.1 NFVF Funding Initiatives

Arising from its legislative mandate, the NFVF has developed a growth and development strategy for the film industry in South Africa. The thrust of the NFVF Strategy for the South African Film Sector is largely developmental in nature and aims to address structural deficiencies within the industry. The NFVF activities include providing funding for the development, production, marketing and distribution costs associated with a film.

The NFVF also provides funding to film students and supports training programmes. In 2006, the NFVF was allocated approximately R36 million by the DAC. The NFVF, through the Feature Film Fund, was able to support a number of feature films. These productions include award-winning films such as *Tsotsi, Yesterday, Drum, Wooden Camera, Zulu Love Letter, Max and Mona, and Forgiveness*.

Tables 2, 3, 4 and 5 display NFVF funding from 2001 to 2007.

Table 2: NFVF Research and Script Development Funding (2001-2007)

Programme	2001	2002	2003	2004	2005	2006	2007
Documentaries	14	8	11	25	17	3	16
Features	12	2	2	16	19	7	16
Shorts	0	3	2	3	6	3	3
Animation	0	1	1	1	1	0	0
Television Series	13	1	1	5	1	0	0

Source: NFVF database

Table 3: NFVF Production Funding (2001-2007)

Programme	2001	2002	2003	2004	2005	2006	2007
Documentaries	15	14	11	40	28	6	21
Features	1	3	5	13	6	2	6
Shorts	5	8	7	7	2	2	0
Animation	1	1	1	1	2	0	0
Distribution and Marketing	5	4	8	8	9	8	15

Source: NFVF database

Table 4: NFVF Education and Training Funding (2001-2007)

Programme	2001	2002	2003	2004	2005	2006	2007
Bursaries	2	19	22	38	74	54	54
Training Programmes	15	5	6	8	4	3	8

Source: NFVF database

Table 5: NFVF Grants (01 April 2006- 31 March 2007)

Programme	Amount
Training and Bursaries	R 3 134 362
Development	R 2 496 081
Production	R 5 551 700
Distribution and Marketing	R21 074 223
Grand Total	**R32 256 365**

Source: NFVF Annual Report (2007)

2.5.2   The Large Budget Film and Television Production Rebate Scheme

The DTI led the development of the Customised Sector Programmes that would help guide the government to develop priority sectors. As part of this process, the Rebate Scheme was introduced in 2004 and administered by the DTI. To be eligible for a rebate, at least 75% of the total amount of all production or co-production costs actually incurred in connection with a film must be paid or payable in South Africa, if the services are rendered or the goods are supplied in South Africa. Eligible applicants are entitled to a rebate of 15% for foreign productions and 25% for South African productions. Qualifying projects, among other requirements, must achieve a Qualifying South African Production Expenditure (QSAPE) of R25 million. The rebate is capped at a maximum of R10 million. The eligible formats are feature film, tele-movie, television drama series or miniseries, documentary or documentary mini-series. The Scheme was introduced with a three-year budget of R252 million. The Finance Minister has allocated an additional R300 million for the next three years. [36] The DTI indicated that the Rebate would be revised, with the introduction of a lower threshold, to provide greater access to South African producers.

Since inception, 19 productions have been completed and have received a total rebate of R123 million. [37] The DTI has approved 15 South African productions with a QSAPE of R733,451,502 and paid out R45,630,451 to six productions.

Two co-productions have been approved and one has been paid out (R2 444 909). The DTI has also approved 20 foreign productions and paid out R75,799,546 to 12 productions.

2.5.3   The Industrial Development Corporation Funding Initiative

The IDC's Media and Motion Picture Strategic Business Unit was established in 2001. The unit's main focus is promoting investment in and the development of the media sector, including printing, publishing, radio, television and motion pictures. In relation to motion pictures, the business area includes feature films, documentaries and television series of

---

[36] Manuel, T. Budget Speech 2007. Available on http://www.info.gov.za/speeches/2007/07022115261001.htm.
[37] DTI: Strategic Plans, Legislation and Budget 2007/8. Trade and Industry Portfolio Committee. 14 March 2007. Available: http://www.pmg.org.za/docs/2007/070314mtsf.ppt#609,16,2006/07 DELIVERABLES.

any genre. The IDC provides funding in the form of equity investment, commercial loans and venture loans. The IDC invests in commercially viable projects and its requirements include securing a significant theatrical release and/or a high profile television broadcast with a distributor or broadcaster to be approved by the IDC. The IDC may participate by up to 49% in the financing of a project.

2.5.4   SABC Film Fund

In November 2006, the SABC announced the establishment of a film fund at Sithengi. The R45 million seed fund will be allocated to the SABC's `icon' project, aimed at producing ten films about South African icons. The SABC is currently formulating a Film Policy that will be informed by international best-practices and broadcaster film funds in other territories, to formulate the terms and conditions for the Film Fund. [38]

2.5.5   Section 24F of the Income Tax Act

Section 24F was introduced as an amendment to the Taxation Act No. 58 of 1962, in 2001. The section was introduced as a special deduction in the determination of taxable income derived from trade as film owners. Section 24F (1) defines a film owner as any person who owns, whether solely or jointly, a film. Persons who render a service to a film owner, such as a production company and distribution companies, are excluded from the definition. A film owner may claim three special deductions under section 24F provision. The first deduction relates to production and post-production costs in respect of a film (film allowance). [39] Film owners qualify for a deduction in respect of marketing expenditure incurred on a South African Export Film (SAEF marketing deduction) and also a deduction in respect of print costs incurred in the making of copies of a film (print cost deduction). The allowance is deductible on completion of the film. The challenge with this provision is that not many filmmakers, if any, are able to use the tax incentive for the benefit of their projects.

2.5.6   Provincial Initiatives

Some provincial governments have established film commissions to provide support to filmmakers. Although not all provinces have such commissions in place, the existing commissions are found in the provinces of Gauteng, the Western Cape and KwaZulu-Natal where most film activities take place. The eThekwini Municipality which falls within the KwaZulu-Natal province has established the Durban Film Office. The Eastern Cape, Free State, Mpumalanga and North West provinces are at various stages of formally establishing film offices.

2.5.6.1 Gauteng Province

2.5.6.1.1 *Gauteng Film Commission*

The Gauteng Film Commission was formed in December 2000 and was initially known as the Gauteng Film Office. It is a provincial agency tasked with the development and promotion of audiovisual industries in Gauteng. One of its objectives is to cultivate diverse and distinctive local work and actively assist previously disadvantaged individuals (PDIs) to participate in the film, television and interactive media production industry. [40]

---

[38] "SABC Formulates Film Policy", Screen Africa Volume 19 January 2007 p 43.
[39] SARS "Taxation of Film Owners Guide" (2004), p 4.
[40] Gauteng Film Commission Annual Report (2006).

The GFC has initiated processes for the establishment of a provincial BEE Fund for Film and TV; private sector partners have been identified and negotiations undertaken in partial response to the establishment of the Gauteng Enterprise Propeller (GEP). This initiative has been reassessed to determine possible programme alignment between the GFC and the GEP. To date, GEP has provided support to a South Africa/Canadian co-production which is directly benefiting small enterprises and historically disadvantaged individuals. [41]

During 2005/2006, the GFC initiated a project to investigate the redevelopment of existing and historic township cinemas and to assess the viability for the establishment of micro cinemas in townships. According to statistics released by AMPS for 2004, only 3% of the country's black population has regular access to cinemas or drive-ins. This is in contrast to the more than 30% of respectively Asian and white South Africans that have regular access. In addition to this project, the GFC is working with film festival organisers to ensure that cinema audiences in non-traditional markets are reached. In 2006, such initiatives included sponsorship of the Nu Metro African Film Festival as well as free public screenings of *Tsotsi* in Soweto, Alexandra and Thokoza. [42]

2.5.6.1.2   *Gauteng Economic Development Agency (GEDA)*

GEDA is an agency of the Department of Economic Development in Gauteng. Its mandate is to implement approved departmental policies designed to grow the economy, attract investment and develop sustainable social-economic infrastructure. Its mission is to promote economic growth, encourage new investment and maximise opportunities for skills transfer and job creation. [43] Film has been identified as one of the industrial sectors which receive special support from GEDA. In 2001 the South African entertainment industry was estimated at R10,5 billion with film and television making up R8,2 billion. Gauteng's estimated share was between R5,7 billion and R6,5 billion. [44]

2.5.6.2   Western Cape Province

2.5.6.2.1   *The Cape Film Commission*

The Cape Film Commission (CFC) was launched in January 2001 and is regarded as the official advocate for the feature film, television, video, commercials and stills photography production industry in the Western Cape Province. The core aim of the CFC is to position Cape Town as a globally competitive film city, thereby boosting tourism, job creation and the development of core skills. The strategic aim is to increase the province's global filmmaking share from its current 1% to 5% by 2005. [45]

The CFC commissioned a study which found that the total turnover of the Western Cape film industry for 2007 was R2,65 billion of which about 77% (R2,03 billion) occurred in Cape Town. It is estimated that the film

[41] Ibid, 31.
[42] Gauteng Film Commission, Annual Report (2006), pg 34.
[43] http://www.geda.co.za/live/content.
[44] Ibid.
[45] www.cfc.co.za accessed on 2 April 2007.

industry created more than 6 000 full-time and 2 500 indirect jobs in Cape Town. [46]

Certain strides have been taken by the city to ensure that the film industry thrives in Cape Town. This is evident in the fact that the city has significantly increased its funding to the CFC from just under R500 000 for the 2006/07 financial year to R2,5 million for the 2007/2008 financial year. [47]

In June 2004 the City of Cape Town drafted the City of Cape Town Film Policy and Protocol. The film policy was drafted in order to provide a framework to assist Council in carrying out its statutory duties to protect the environment and represent the interests of local communities, while also realising the economic benefits of filming.

The objectives of the film policy are to assist Council in carrying out its statutory mandate, establish the roles and responsibility of the stakeholders and disseminate information to the industry and the general public on the proposed types of approvals required for location filming. [48]

2.5.6.3 KwaZulu-Natal Province

2.5.6.3.1 KwaZulu-Natal Film Commission

The KwaZulu-Natal Film Commission (KZNFC) was set to be established in 2005 to promote and develop the film industry in Durban and KwaZulu-Natal. It is meant to operate both as a specialist agency marketing and promoting the region as a destination for local and international filmmakers, and as a regional trade association/networking body for the industry. [49] The goal of the Commission was to open up the global film industry market to the KZN region by creating 5 000 new jobs and 30 new business enterprise by 2008, thereby reinforcing economic growth, social stability, black enterprise development and skills upliftment for the province. [50]

The Durban Film Office established in October 2003 by eThekwini Municipality is responsible for film-related interests of the Metropolis. [51] The office is the official advocate for the feature films, television, video, commercial and stills photography production industry in Durban and the region.

2.6 International Cooperation Agreements

South Africa has entered into a number of audiovisual co-production treaties that make provision for collaboration on film, television, video and multi-media distribution platforms. South Africa signed its first film co-production treaty with Canada in 1997. At the time, the approval process for co-production status was administered by the then DACST, which later became the DAC. In 2004 that function was transferred to the NFVF, which is responsible for the administration of the application processes for an advance and final ruling.

---

[46] Ibid.
[47] Cape Film Commission, Media Release "City Substantial Support For Film" (2007). For further enquiry visit: www.capetown.gov.za.
[48] Ibid.
[49] KwaZulu-Natal Film Commission-Draft Business Plan 2005-2008, p 3.
[50] Ibid.
[51] www.durbanfilmoffice.com.

However, with respect to the latter, the NFVF receives the application and relevant documentation and makes a recommendation to the Minister of Arts and Culture, who then makes a decision on the final co-production status ruling, based on the NFVF's recommendations.

South Africa has entered into three other co-production agreements: Germany (2004), Italy (2003), and the United Kingdom (2006). Negotiations are currently underway with Ireland, Australia, France and New Zealand.

One of the main objectives behind co-production agreements is that there should be a development of the co-producing countries' cultural and economic exchanges. More particularly, the overriding aim of such agreements is to ensure that an overall balance is achieved regarding the following key elements:

- National contributions to the production costs of all films.
- The usage of studios and laboratories of co-producing countries.
- Employment of nationals as creative, craft and technical personnel.
- Participation by nationals of the co-producing countries in each of the major creative, craft and technical categories, in particular those of writer, director and lead cast.

A co-production project, after undergoing the certification process, is certified as a national film by the relevant competent authorities in each co-producing country. A national film under a co-production agreement is eligible for state support and any other privileges attached thereto in the respective co-producing countries. [52] These include, but are not limited to, financial incentives, support and instruments. These collaborations also open up access to markets in both co-producing partners' countries.

The co-production agreements require the co-producing partners to contribute on the financial, creative, craft and participation levels. The agreements require such participation to be at least proportional to each co-producer's financial contribution towards the total cost of the production. Part of the production budget must be spent in the co-producing countries, on the use of local performers, crew and technical personnel. Location filming may be permitted outside of the participating co-producers' countries in exceptional circumstances, subject to the approval of the competent authorities.

Table 6: Summary of Co-production (1997-2007)

Treaty	Number of Projects	Total Budget
SA/Canada	17	R 829,028,755
SA/Italy	4	R 329,809,485
SA/Germany	6	R 171,168,000
SA/UK	1	R 27,542,252
Grand Total	**28**	**R 1,357,548,492**

Source: NFVF database[53]

[52] Article 3 (2) of the Agreement between the Government of the Republic of South Africa and the Government of the Federal Republic of Germany on Audio Visual Co-production, 14 November 2004.
[53] NFVF analysis

The total value of South African investment in co-production projects has been R347,286,715 over the past decade. Through its various entities, the SA government has been a key investor in co-production projects, as outlined in Table 7 below.

Table 7: Breakdown of SA Funding Sources for Co-Productions (1997-2007)

Source of Funding	Amount
Private Investment	R 7,817,936
DTI	R 95,844,776
SABC	R 6,606,700
NFVF	R 3,154,500
IDC	R 233,862,803
Grand Total	**R 347,286,715**

Figure 1: SA Funding Sources for Co-Productions (1997-2007)
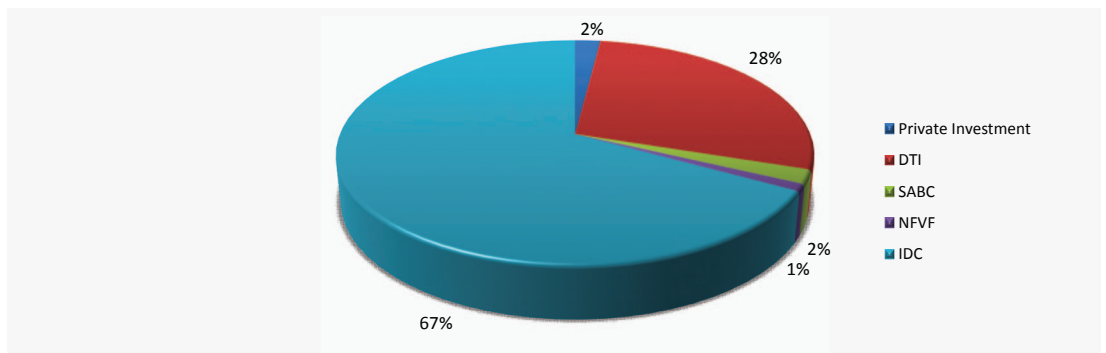
Source: NFVF database

2.7 Distribution and Exhibition

Distribution and exhibition in South Africa is widely dominated by foreign products. The Hollywood distribution model continues to have a stronghold in markets across the world, with 50% of its revenue generated outside the United States. The local industry consists of three major players – Ster-Kinekor, Nu-Metro and United International Pictures (UIP) – and a few independents that have a small share of the market. Local filmmakers are quite unable to compete with this overpowering foreign competition owing to the largely production-led nature of our industry, which dedicates very low budgets to distributing and marketing films to a potentially large film audience. [54]

2.7.1   Digital Film Distribution

The digital era brings possibilities that will impact on accessibility, protection and lower costs for the distribution of film products. The conversion from analogue to digital cinema technology means that filmmakers no longer have to shoot on 35mm cameras or convert High Definition into 35mm to guarantee theatrical release. Post-production costs will also be lowered because of the inexpensive nature of digital technology. [55]

[54] Dearham, M. Film and Democracy in South Africa (2001). Available: www.fru.co.za accessed on 19th February 2007.
[55] www.digitalcinema2007.co.uk.

A single 35mm print costs between R10 000 to R35 000 and the cost multiplies with the number of prints and screens. The elimination of the 35mm print will, in turn, allow local distributors and producers to recoup some production costs from theatrical releases and widen a film's exhibition platform. [56]

Digital cinema can also be encrypted, stored and played from the exhibitioner's server to avoid the possibility of piracy. This eliminates the high storage and transportation costs that a 35mm print requires.

Figure 2: Digital Screens by Operator
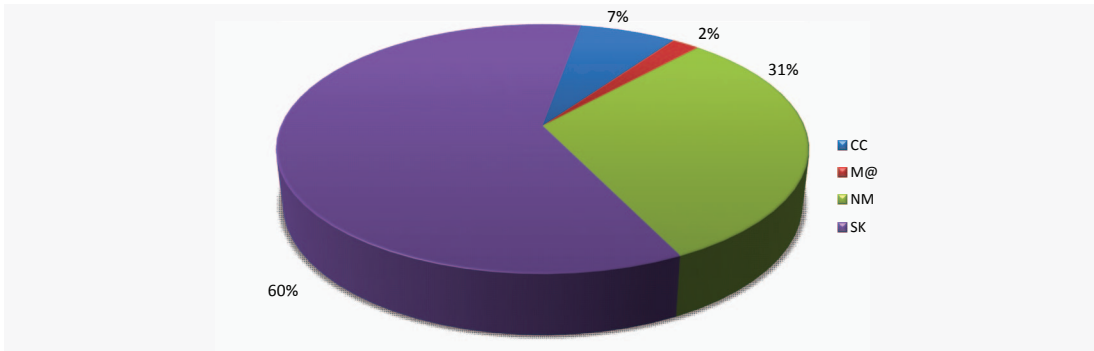
Source: Cinemark

By the end of December 2006, there were 62 digital screens across the country. Of these, 60% were operated by Ster-Kinekor, 31% by Nu-Metro, 7% by Cine Centre, while M@ operated 2%. Most screens are located in Gauteng.

Table 8: Number of Screens per Screens Type

Screen Type	Number of Screens
Not Specified	61
35mm Commercial	520
35mm Nouveau	39
Digital	62
Grand Total	**682**

Source: Cinemark Attendance Report (2006)

---

[56] Armstrong C and Ford H (2007). Innovations in Licensing Rights & Copyright for Digitised, Sustainable Film Distribution in South Africa, July 2007.

Table 9: Number of Cinemas per Province

Province	Number of Cinemas	Percentage (%)
Eastern Cape	5	6
Free State	2	2
Gauteng Province	44	49
KwaZulu-Natal	13	15
Limpopo	1	1
Mpumalanga	4	4
North West	2	2
Western Cape	18	20
Grand Total	**89**	**100**

Source: Cinemark Attendance Report (2006)

Table 9 illustrates that 49% of cinemas are found in Gauteng, 20% in the Western Cape, and 15% in Kwazulu-Natal. Limpopo has the least number of screens, with only 1%.

2.7.2   The DVD and Video Industry

Nigerian films dominate the informal DVD market, with some evidence of an emergence of independent filmmakers who exhibit straight to DVD. Research undertaken by the NFVF indicates that in Gauteng, Johannesburg's city centre is a thriving platform for a variety of informal distributors and exhibitors. They range from street vendors who rent out copies of Nollywood titles and pirated local and international titles on DVD, to outlets that have viewing, rental and duplication facilities. These mostly screen Nollywood titles and popular Hollywood blockbusters.

There is also a thriving informal exhibition culture, where old cinemas show two films for the price of one during the week, and cheaper Sunday specials, where customers pay as little as R5 for one movie. These outlets are frequented mostly over the weekends.

Figure 3: DVD Rental Outlet
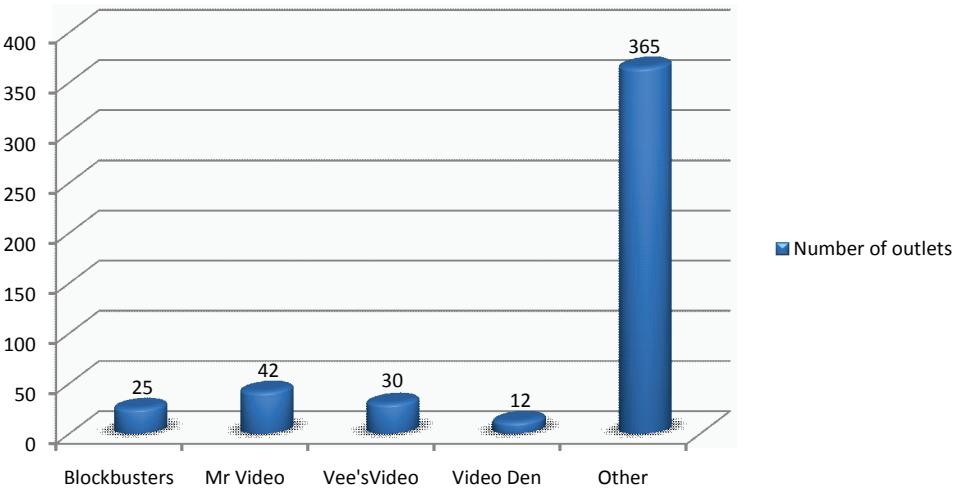
Source: NFVF database

The NFVF database reflects a total of 474 DVD rental outlets. Most DVD rental businesses are registered as close corporations while some are franchises, mostly dominated by Mr Video with 42 outlets, followed by Vee's Video with 30 outlets. There are a number of retail outlets that distribute DVDs, who were not able to supply information at the time of writing this report.

Figure 4: Provincial Spread of DVD Rental Outlets

	Eastern Cape	Free State	Gauteng	KwaZulu-Natal	Limpopo	Mpuma-langa	North West	Western Cape	Northern Cape	Unknown
■	52	18	141	77	10	28	24	86	20	18
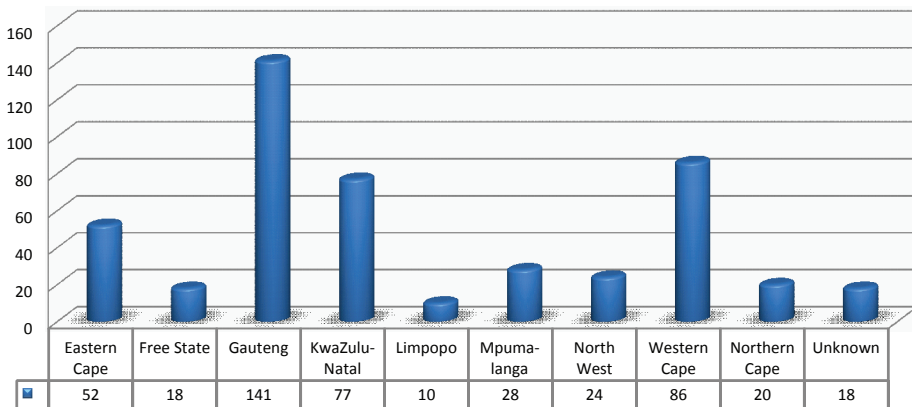
Source: NFVF database

2.7.3 Video-On-Demand, Pay-Per-View and DVD Delivery Services

Digital content delivery offers new opportunities for content originators and/or filmmakers. Various distribution platforms such as video-on-demand (VOD) and pay-per-view are some of the alternative delivery platforms where consumers can access content on demand and view it whenever they wish. Some independent filmmakers have pioneered by offering their films on the internet via online distribution, while others have gone as far as shooting and distributing film through mobile technology, e.g. *SMS Sugarman.* [57]

Digital content delivery presents a number of benefits to the filmmaker and consumers. For the filmmaker, it opens up alternative distribution beyond traditional platforms (cinema, DVD rentals etc.) and provides a platform to showcase creativity. Allowing filmmakers to retain copyright for these alternative platforms contributes to increased revenue for content originators and, as a result, general industry growth and sustainability. Consumers have the option to choose content or films that appeal to them, and viewing them at their convenience.

2.7.4 South African Box Office

In 2000, cinema attendance hit an all-time low of 24,257,023. This was followed by a rise from 2001 to 2005. Cinema attendance rose significantly by 5.2% in 2004/5; its highest peak in the 1997 to 2007 period. It has since declined (1.1% drop in 2005/6 and 5.1% drop in 2006/7). The rise in 2004 can be attributed to the relative increase in the number of production of local films and the slashing of movie ticket prices by both Ster-Kinekor and Nu Metro cinemas. In March 2005, Ster-Kinekor announced a price reduction of more than 50%, from R35.00 to R14.00 at selected cinemas. Nu Metro followed suite with a price reduction from R37.00 to R12.00. Figure 5 below illustrates cinema attendance trends from 1997 to 2007, while Figure 6 reveals that cinema attendance peaks during school holidays, a trend that occurs annually.

---

[57] Armstrong C and Ford H. Innovations in Licensing Rights & Copyright for Digitised, Sustainable Film Distribution in South Africa: July 2007

Figure 5: Cinema Attendance 1997-2007

	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
◆ Attendance	25,363,357	26,697,399	24,369,023	23,257,198	24,054,973	24,619,432	25,719,608	26,173,243	27,623,373	27,324,503	25,991,039
■ SA films				1	3	2	7	9	13	11	9
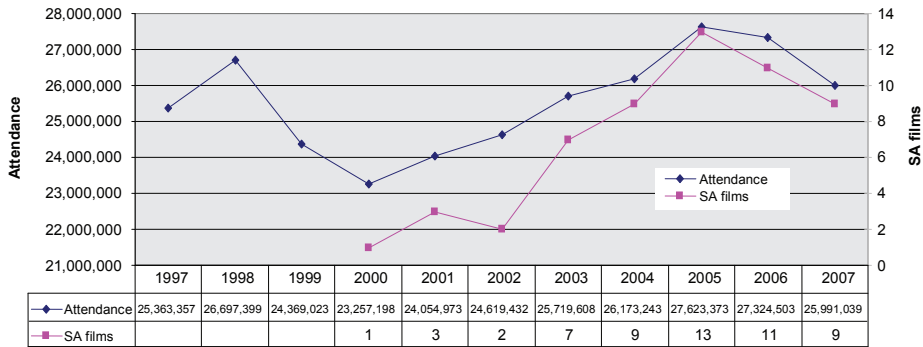
Source: UIP (2006)

Figure 6: Cinema Attendance Trends per Month (2002-2007)
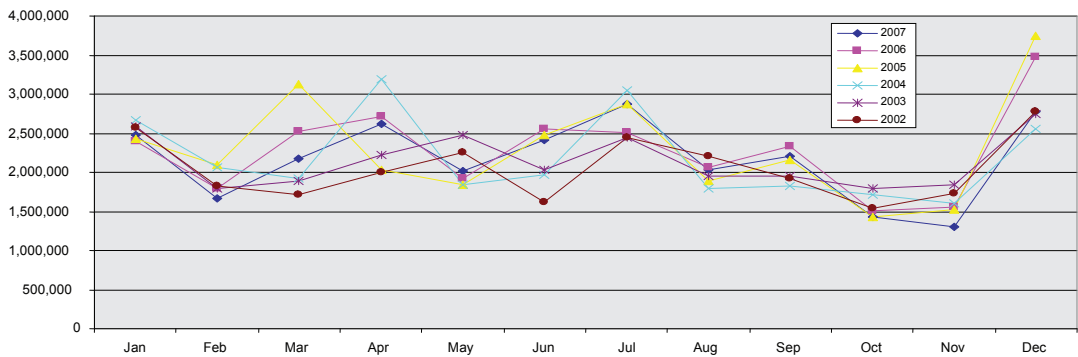
Source: Cinemark Attendance Report (2006)

Table 10: Number of Films released in South Africa: Gross Box Office (2006)

Country	Number of Films Released	Gross Box Office
United States of America	171	R 540,483,458
South Africa	9	R 15,150,074
United Kingdom	23	R 8,030,456
Canada	1	R 257,180
Australia	7	R 26,108
Italy	2	R 15,511
France	3	R 10,099
Grand Total	**216**	**R 563,972,886**

Source: Analysis compiled by the NFVF using data supplied by Ster-Kinekor, Nu-Metro, UIP

As indicated earlier, it is clear that the exhibition landscape is dominated by foreign films. There were a total of six local films released between 2001 and 2002 and four released in 2004. Eleven were released in 2005, seven in 2003, nine in 2006 and four local films released in 2007. These figures are those of the major exhibitors (Nu Metro, Ster-Kinekor and UIP)

and do not include local films released by independent exhibitors. Neither the exhibitors nor the producers were able to provide information on the international performance of South African films, but it is evident that the South African film industry does not release enough local content to compete against international products. There is also an absence of screen quotas or incentives to encourage exhibitors to show South African titles.

2.7.5   Piracy

Piracy continues to pose a serious challenge for film and other content industries globally. The Southern African Federation Against Copyright Theft (SAFACT) [58] is a Section 21 company which represents companies in the entertainment industry involved in the production and distribution of motion pictures and interactive games. SAFACT was established in 1999 to protect the intellectual property rights of its members in the Southern African film, home entertainment and interactive games industries. Its mission is to create an anti-counterfeiting climate in which the purchase, sale or possession of counterfeit goods is actively discouraged and where intellectual property rights are respected. The South African Police, Customs, the DTI and the Justice Department assist SAFACT in enforcing intellectual property rights.

2.7.6   South African Programming on Television

The South African broadcasting system is divided into three tiers – public, commercial and community broadcasting – and is regulated by ICASA. Chapter 9 of the ECA applies to broadcasting services licensees and provides for programming obligations that include language, local content quotas, programming requirements etc. The current broadcasting landscape has the following players: MultiChoice (Dstv), SABC and etv. The South African broadcasting landscape is occupied by diverse broadcasting services. This section highlights some of these services and their role in the development of the local independent production sector.

2.7.6.1 Public Broadcasting Services

The SABC is the only public broadcaster in South Africa. Since its establishment, it has undergone a number of changes ranging from its objectives to its role within society. In 2003 ICASA published the Position Paper on Regional Television Broadcasting Services. The aim of the paper was to introduce Regional Television Broadcasting Services as determined by Section 2 of the Independent Broadcasting Authority Act (IBA) no 153 of 1993. [59] The SABC has been granted two regional licensees under its public service division.

The SABC published a policy on local content guided by various legislations, including the ICASA Act, Broadcasting Act and the relevant ICASA regulations. [60] The policy is underpinned by values such as developing and protecting national culture and character, and the need to support the production of local content by South Africans, particularly historically disadvantage citizens. The SABC is also bound by Local Content Quotas prescribed by ICASA; these quotas prescribe the percentage of air-time to be allocated to local content and the type of genres to be screened during that time.

[58] See http://www.safact.co.za/about_safact.htm for SAFACT details.
[59] Sec 2 of the Independent Broadcasting Act 153 of 1993 states that the Authority is to promote the provision of a diverse range of television broadcasting services on a national, regional and local level as this would cater for all languages and cultural groups'.
[60] http://www.sabceducation.co.za/VCMStaticProdStage/CORPORATE/SABC%20Corporate/StaticDocument/About%20SABC/local.pdf.

2.7.6.2 Satellite and Subscription Services

ICASA published an Invitation to Apply (ITA), for commercial satellite and cable subscription television services, after it launched a positioning paper on subscription broadcasting services in 2005. ICASA received 16 applications and only five applications were awarded licenses.

On Digital Media is "a mixture of local and renowned international partners each with specific complementary industrial skills and assets such as quality content that offers services subscriptions ranging between R149 to R349 a month". [61]

Telkom Media has been awarded a satellite and cable subscription service. It plans to offer content and services including over the internet (online content services and ISP services), over satellite (satellite and radio) and "quality of services" network (IPTV, including broadcast and on-demand TV and interactive services). [62]

E-SAT is 100% owned by SABIDO Investments, whose main operating investment is etv, South Africa's first private, free-to-air channel. No details were available about their monthly subscription or content. [63]

MultiChoice Africa is a wholly owned subsidiary of MIH. It provides television entertainment through its Dstv, Dstv Indian and Dstv Portuguesa bouquets, to over 1 311 531 subscribers in South Africa. MultiChoice has terrestrial analogue and digital, direct-to-home, satellite television platforms. Via satellite, the company imports channels (for the most part from Britain and the US) and packages them along with local channels originating from the countries in which it operates. The announcement of the new satellite pay-TV licences signals the end of MultiChoice's long monopoly of the market. [64]

Walking on Water is a Christian-based channel, offering dramas, movies, comedies, talk shows, music, youth and kids' programmes, with some business news and current affairs. The subscription is R49 per month. [65]

It is expected that licences will be issued during the first half of 2008 and that services, with the exception of MultiChoice, will be available from mid-2008.

2.7.6.3 Community Broadcasting Services

Previously, only Trinity Broadcasting Network operated a community television broadcasting service. Although ICASA has granted the public broadcaster a regional television broadcasting service (a licence to operate SABC 4 and SABC 5), ICASA will only issue the licensees to the SABC once funds have been secured to operate the new services.

One temporary community television broadcasting service licence has been awarded to Soweto TV, a volunteer community television initiative based in Soweto. Soweto Community TV is an interactive "talk radio on television" concept, where both presenters and producers of all shows engage with Soweto viewers about issues relevant to Sowetans.

---

[61] http://www.ondigitalmedia.co.za.
[62] www.telkommedia.co.za.
[63] http://www.moneyweb.co.za/mw/view/mw/en/page39?oid=160346&sn=Detail.
[64] www.multichoice.co.za.
[65] http://www.moneyweb.co.za/mw/view/mw/en/page39?oid=160346&sn=Detail.

The programme line-up includes gospel music, spiritual talk, sports, entertainment, women's talk, Soweto Today (current affairs around Soweto); a Youth interactive show; and live news feeds every hour on the hour from The Sowetan newspaper. [66]

The Cape Town Community Television Collective, at the time of writing, was in the process of applying for a licence from ICASA.

Table 11: Summary of South African Local Content Quotas

Type of Programming	Public & Community	Commercial	Subscription
Drama	35%	20%	2%
Current Affairs	80%	50%	
Documentary	50%	30%	
Informal Knowledge Building	50%	30%	
Educational	60%	-	
Children	55%	25%	

Source: ICASA

2.7.7   Television Market Penetration and Viewing Patterns

In terms of television penetration, there are approximately 19 million households with television sets in South Africa – a television ownership rate of 79.7%. There was steady growth in television households from 2004 to 2006. The number of households with DVD players grew from 3.27% in 2004 to 7.41% in 2006. The number of households with less popular VCR players decreased from 0.96 in 2004 to 0.62 in 2006.

Figure 7: TV Equipment in Households

Source: AMPS

---

[66] http://townships.iblog.co.za/2007/06/26/soweto-tv-station-launch/.
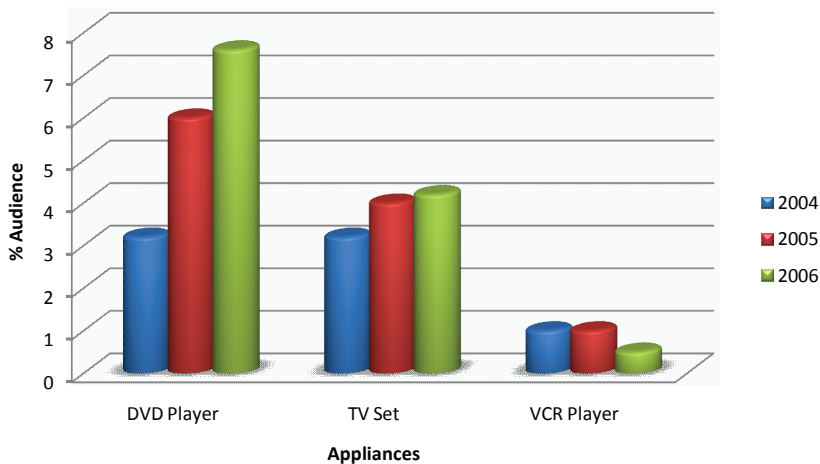
Figure 8: Television Audience Share
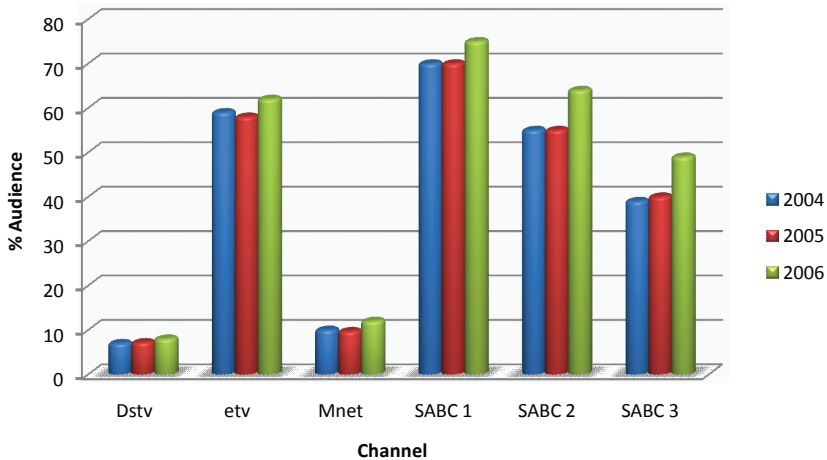
Source: AMPS

In general, all channels increased their reach over the 2004 to 2006 period. SABC 1 has the major audience share (76.1%), followed by SABC 2 (63.6%) and etv (62.5%). SABC 3 (49.5%) is included in the top four channels vying for television audience. M-Net and Dstv have lower audience shares (12.0% and 7.5% respectively).

Table 12: Top Programmes and Audience Ratings (August 2007)

Channel	Programme	Genre
SABC 1	*Generations*	Soap
SABC 1	*Zola*	Magazine
SABC 2	*Muvhango*	Drama
SABC 1	*Jam Alley*	Variety
SABC 2	*7de Laan*	Soap
SABC 1	*Selimathunzi*	Variety
SABC 1	*Laduma on 1*	Sport
etv	*Scandal*	Drama
etv	*News at Seven*	News
SABC 2	*Pasella*	Magazine

Source: ScreenAfrica, November/December 2007

2.7.8   Digital Migration

The Department of Communications (DOC) has developed a digital migration strategy that aims to introduce a policy framework for the transition of broadcasting systems, from analogue to digital. The Digital Migration Working Group (DMWG), established in 2005 by the Minister of Communications, delivered its report of recommendations to the Minister in November 2006. The DOC announced that 'digital switch-on' would come into effect from 1 November 2008. There will be a three-year period of dual illumination. Analogue frequencies will be discontinued from 1 November 2011. It is anticipated that digital migration will usher in the introduction of additional content and channels.

2.7.9   Performance of South African Films

The table below presents the performance of South African films from the period 2001 to 2007. As the table indicates, local films which performed exceptionally well at the box office are films created by Leon Schuster i.e. *Mr Bones, O Shucks I'm Gatvol and Mama Jack.*

Table 13: Performance of South African Films Released (2001-2007)

Title	Gross Box Office Figures	Year of Release
Mr Bones	R 33 062 486	2001
The Long Run	R 112 064	2001
Boesman and Lena	R 8 805	2001
Lumumba	R 348 432	2002
Mama Africa	R 3 734	2002
Yellow Card	R 28 672	2002
Stander	R 1 956 593	2003
Promised Land	R 30 974	2003
Amandla	R 316 162	2003
Hijack Stories	R 172 019	2003
God is African	R 115 905	2003
Cosmic Africa	R 107 692	2003
Malunde	R 86 907	2003
Oh Shucks, I'm Gatvol	R 23 484 567	2004
Yesterday	R 1 549 513	2004
Story of an African Farm	R 601 441	2004
Forgiveness	R 334 144	2004
Mama Jack	R 27 260 955	2005
The Flyer	R 404 105	2005
Max and Mona	R 319 712	2005
Red Dust	R 316 298	2005
Carmen in Khayelitsha	R 294 035	2005
In My Country	R 155 840	2005
Boy Called Twist	R 150 632	2005
Zulu Love Letter	R 140 062	2005
Sophiatown	R 90 818	2005
Born into Struggle	R 13 697	2005
Faith's Corner	R 10 028	2005
Number 10	R 468 225	2006
Beat the Drum	R 280 019	2006
Conversations on a Sunday Afternoon	R 12 615	2006
Sarafina (re-release)	R 368 007	2006
Heaven's Herds	R 34 868	2006
Wah Wah	R 515 489	2006
Bunny Chow	R 368 580	2007
Ouma Se Slim Kind	R 318 363	2007
Footskating	R 218 639	2007
Faith Like Potatoes	R 3 580 335	2007

Source: Ster-Kinekor

In 2006, 221 titles were released to cinemas countrywide (excluding Bollywood titles). Only nine of these titles were local, the majority being Hollywood titles. South African titles accounted for only 2.6% of exhibition market share.

Table 14: South African Top Ten Films of All Time

Release Date	Title	Number of Prints	Box Office	Attendance
11/30/2001	*Mr Bones*	87	R33 057 059	1 864 971
11/24/2005	*Mama Jack*	103	R27 245 567	1 523 643
3/26/2004	*Oh Shucks, I'm Gatvol*	106	R23 484 567	1 048 025
12/6/1996	*Panic Mechanic*	82	R16 256 818	1 320 404
12/3/1993	*There's a Zulu on my Stoep*	65	R9 785 003	1 072 929
12/3/1999	*Millennium Menace*	70	R8 492 753	386 034
2/3/2006	*Tsotsi*	21	R8 152 864	439 279
12/13/1991	*Sweet 'n Short*	69	R7 85 001	998 093
10/13/1989	*Gods Must Be Crazy*	50	R7 305 550	1 209 128
12/15/1989	*Oh Shucks, it's Schuster*	43	R6 535 084	N/A

Source: Ster-Kinekor

With the exception of *Tsotsi*, the South African top ten is dominated by Leon Schuster, who is arguably the most successful South African filmmaker, judging by gross box office returns and audience figures. Leon Schuster has three titles in the top ten grossing movies in SA.

2.8 Economic Contribution

Film is generally viewed purely from an entertainment perspective, with a disregard of its economic value and contribution. This view is challenged by the advent of the information age and the accompanying notion of the information economy. The film industry in South Africa has been identified through ASGISA as a sector with excellent potential for growth, contributing to the economy and creating jobs. The film industry by its very nature creates a commodity that has enormous export value.

The film industry is not classified as a sector in its own right in the national accounts, which makes it difficult to isolate film and television related activities. It falls within three categories in the SIC – under community, personal and social services (major division 9), hospitality, catering and accommodation (major division 6), and transport, storage and communications (major division 7). Relevant economic data is highly aggregated and, therefore, cannot be used in assessing the economic importance of the film and television industry. The result is that it is difficult to quantify accurately the economic contribution of the film industry throughout the value chain to the gross domestic product (GDP) of the South African economy.

2.9 Conclusion

The South African film and television industry has come a long way from the conservative and propaganda tool that it was engineered to be by our early government. Today, South Africa has a growing film industry that is increasingly competitive internationally. Local and foreign filmmakers are taking advantage of the country's diverse cultures, unique location, low production costs and favourable exchange rates. The constitutional regime also provides a dynamic environment where ideas, views and diversity is encouraged and tolerated.

The government has also developed a number of policies that recognise the economic potential of the cultural industry, and specifically film, as a potential growth area capable of creating employment and enterprise development. Government programmes such as CIGS, ASGISA and JIPSA reflect this potential. However, the film industry remains underfunded despite a number of government agencies such as the NFVF who has been created to spearhead the growth and development of the industry.

The Department of Communications has developed a digital migration strategy that aims to introduce a policy framework for the transition of broadcasting systems from analogue to digital. Content creation will be vital in this environment and present enormous opportunities for the independent production sector.

South Africa has also entered into a number of co-production treaties aimed at the development of cultural, skills and economic exchanges. Currently, four treaties have been signed. While these arrangements are cumbersome from an administrative point of view, they do provide for better opportunities to enter into other markets and to raise finance. However, the ability to secure finance is vital to creative control, and South African producers are still lacking in this area as most projects are originated by foreign co-producers.

The distribution and exhibition landscape is still dominated by foreign products. Local films struggle to capture the local audience, making it difficult for the majority of South African films to enjoy box office success or recoup production costs from exhibition. While there are a number of reasons that can be attributed to this, it is vital to ensure that filmmakers tell stories that are universal; stories that will find audiences both locally and in foreign territories. While it has been proved with television programmes that 'local is lekker', the opposite seems true with cinema.

Chapter 3:
Film Education and Training in South Africa

3.1 Introduction

This Chapter provides a brief, legislative outline of the South African higher education, further education, [67] and skills development landscape, post-1994 and how the current education provision meets the demands of South African film and television training. Drawing on the constitutional provision for access to education and training, it maps out the landscape, with respect to the mandates of government agencies at the general, further education, higher education as well as the vocational levels of skills acquisition. A brief, descriptive overview of television and film-related education and training provision is provided. The section further identifies schools from various countries to be used for international benchmarking.

3.2 Policy and Legislative Framework for Education and Training

One of apartheid's legacies was the lack of access and opportunities to pursue higher education for the majority of the population. Where opportunities existed, allocations to these institutions were based on the racial population of the public institutions concerned. In the mid-Nineties, only a few well-resourced universities in South Africa were producing world-class research and teaching. [68]

The dawn of democracy in 1994 resulted in a concerted effort by the democratically elected government to provide a balanced higher education landscape. To this end the Higher Education Act No. 101, 1997 was promulgated. The Act introduced a structured higher education system, with programmes and institutions that are intended to better respond to human resource, economic and other developmental needs of a democratic South Africa. They are also intended to redress past discrimination and ensure representativeness and equal access to education. [69]

Accordingly, section 29(1) (b) of the South African Constitution Act 108 of 1996 provides for the right to further education, which the state, through reasonable measures, must make progressively available and accessible.

Drawing on seminal policy documents, the National Commission of Higher Education envisaged that a crosscutting framework would universalise access for all South African citizens and generally improve the quality of their education and training provision.

It was intended that the framework be built on the existing strengths within the South African Higher Education system. In so doing, it might better enable successful economic participation in the global market. [70]

3.2.1   The South African Qualifications Authority (SAQA)

SAQA was established by the South African Qualifications Authority Act No. 58 of 1995 and was appointed by the Ministers of Education and Labour. The Authority's mandate is threefold; to create a national framework to identify and measure learning achievements; develop the quality of education provision in South Africa, and facilitate the redress of past, unfair discriminations in the context of education. [71]

---

[67] Education policy at the GET level has been omitted due to the bulk of formal film education occurring at the Higher Education / Further Education level.
[68] National Commission on Higher Education, 1996.
[69] Preamble of the Higher Education Act 101 of 1997.
[70] Ibid.
[71] Ibid.

Over the years, the implementation of these tasks has been revised in response to environmental changes and to institutional response, without forgoing the objective of effecting transformation of the provision of education and training. [72] SAQA's functions can be summarised as follows: accreditation, standardisation, and moderation. [73]

3.2.1.1 Accreditation

The SAQA Education and Training Quality Assurance (ETQA) Bodies Regulations (Government Gazette No 19231, 1998) provide for the registration and accreditation of ETQA bodies. Operating within their sector of primary focus, these bodies:
- Monitor and audit learning achievements in line with national standards and qualifications;
- Accredit constituent providers with specific standards or qualifications registered on the NQF;
- Promote quality of provision among constituent providers; and
- Maintain the SAQA-approved database (SAQA 2003).

The ETQA's role is to assess a training provider's capacity to provide (and efficacy in providing) the relevant quality of training. [74] In accordance with the NQF principles of life-long learning, the ETQA is also required to provide targeted support to the training provider.

Of the four structural components against which training providers are assessed for accreditation, the assessment policy provides the final qualification of the process of skills transfer.
The other three criteria, for which documented proof must be submitted, include the institutions':
- Quality Management System (QMS);
- Staff selection, appraisal and development policy; and
- Learner entry, guidance and support policy. [75]

3.2.1.2 Standardisation

Section 5 (1) (a) (ii) of the SAQA Act provides for the registration of National Standards Bodies (NSB) and Standards Generating Bodies (SGB) who have the responsibility of establishing education and training standards or qualifications. [76]

There are six stakeholders (government, business, labour, providers, community and critical interest groups) represented in NSBs, while SGBs are made up of individuals who are proficient in their related sub-field. The SGB's predominant function is to generate the qualifications and unit standards required by its sub-field, while the NSB ensures that the qualifications and standards meet SAQA's requirement for registration on the National Qualifications Framework (NQF). [77]

3.2.1.3 Moderation

The process of moderation is to ensure integration and alignment among training providers. This process translates from the national level (NSBs submit qualifications with moderation options) and the sectoral level (ETQAs establish moderation systems

---

[72] Luckett, K (2005) "A Critical Policy Analysis of the Proposed National Quality Assurance System for South African Higher Education" in HESA (Eds.) *The Decade Ahead: Quality Assurance in South African Higher Education.*
[73] SAQA (2003) Equitable Accreditation for SMME providers of Education and Training.
[74] http://www.saqa.org.za/structure/sgb/manual1.pdf.
[75] Ibid.
[76] http://www.saqa.org.za
[77] SAQA (2004) SGB Manual Draft 4.

for accreditation providers), to the organisational level (where providers are required to establish internal moderation systems in line with the ETQA's).

3.2.2 The National Qualifications Framework

The SAQA Act established the National Qualifications Framework (NQF). [78] This was designed as a non-discriminatory human resource development strategy, to:

- Create an integrated national framework for learning achievements;
- Facilitate access, mobility and progression within education, training and employment;
- Enhance the quality of education and training;
- Accelerate redress of educational and job opportunities; and
- Advance personal, social and economic development. [79]

By providing a single measure against which to plot learner achievement and qualifications, the NQF is intended to enable the crosscutting of skills gained through formal and work-place learning. Similarly, the NQF enables the granting of qualifications to formal graduates, as well as to those individuals who have gained equivalent skills vocationally. These NQF objectives apply across all three bands of the formal education learning system, as well as in the labour market. [80]

3.2.3 Sector Education Training Authorities

Section 9(1) of the Skills Development Act No 97 of 1998 makes provision for Sector Education and Training Authorities (SETAs). The film and electronic media sector is supported by the Media, Advertising, Printing, Publishing and Packaging (MAPPP) SETA. MAPPP SETA offers learnerships in audio-visual production from NQF 4 to NQF 7 levels.

SETAs are required to register as ETQAs and, in so doing, take on the associated responsibilities of providing support for, and assessing, training provision. With specific reference to skills development, a SETA is also required to develop a Sector Skills Plan (SSP) within the framework of the National Skills Development Strategy (NSDS). [81]

3.2.4 Recognition of Prior Learning (RPL)

The NSB regulations issued in terms of the SAQA Act defines RPL as:

"The comparison of the previous learning and experience of a learner howsoever obtained against the learning outcomes required for a specified qualification, and the acceptance for purposes of qualification of that which meets the requirements." [82]

This is to ensure that the higher education policy realises the national imperatives stipulated in these national strategies and ensure uniformity with all national policies.

3.3 National Strategies for Skills Development

Higher education policy is intended to operate in tandem with other national strategies, such as NSDS, ASGISA, JIPSA, and NIPF as described in Chapter 2 of the report.

---

[78] Blom R and Keevy J. The Impact of the implementation of the National Qualifications Framework on Education and Training in South Africa. In http://www.saqa.org.za/show.asp?main=docs/pubs/bullvol10.html
[79] http://www.info.gov.za/otherdocs/2003/nqfcons.pdf.
    http://www.saqa.org.za.
[80] http://www.saqa.org.za.
[81] Section 10 (1)(a) of the Skills Development Act No.97 of 1998.
[82] http://www.umalusi.org.za/ur/Conferences/AEAA/Heyns%20R.PDF.

3.3.1 National Skills Development Strategies (NSDS)

The Department of Labour's National Skills Development Strategy (NSDS) is intended to contribute towards sustainable development of skills growth, development and equity of skills development institutions by aligning their work and resources to the skills needs for effective delivery and implementation. The NSDS translates into a strategy for skills development, in line with NQF objectives. The main drivers of skills development are the SETAs and the National Skills Authority. [83]

South Africa is currently in the second phase of the Department of Labour's implementation of its NSDS. The first NSDS (2000 to 2005) provided a detailed tracking of the performance of the NSF as well as the SETA's implementation and management of the Skills Development Levy (SDL). Drawing on recommendations generated by its predecessor, the new NSDS (2005 to 2010) identified scarce skill priority areas and provided performance indicators that inform the service level agreements between the SETAs and the projects they fund. [84]

The NSDS 2's objectives are. [85]

- To prioritise and communicate critical skills, for sustainable growth, development and equity;
- To promote and accelerate quality training in the workplace; and
- To promote employability and sustainable livelihoods through skills development.

The private and public sectors comply with NSDS 2 in different ways. In terms of Section 3 (1) (b) of the Skills Development Levies Act No. 9 of 1999, private sector employers (with some limited exceptions) are required to pay a levy of one per cent (1%) of remuneration to their relevant SETA. The levies are paid to SARS; 80% of the levies are distributed to different SETAs and 20% goes into the National Skills Fund (NSF), from which funds are disbursed by the SETA, to companies, through a process of mandatory and discretionary grants. At present, government departments, public entities and parastatals are accountable for their own implementation of the skills component of the action programme.

Section 10(1) (b) (ii) of the Skills Development Act introduced the Workplace Skills Plans (WSP) that describe employers' plans for the training and development of employees in the forthcoming year. This is based on the analysis of business requirements and the skills needs of staff.

It describes the skills priorities, education and training programmes that are required to meet and deliver those priorities, as well as the staff to be targeted for training, indicating the race, gender and disability status of these beneficiaries. The WSP must be approved by a relevant SETA.

Since 2006, the WSP has been judged by an additional criterion i.e. a report on the performance against the previous year's WSP (NSDS II Lever 2.1 under Success Indicator 2.1). [86]

3.3.2 Joint Initiative on Priority Skills Acquisition (JIPSA)

The Joint Initiative on Priority Skills Acquisition (JIPSA) was established in March 2006, to address scarce and critical skills needed to meet ASGISA's objectives. One of the most significant challenges facing growth was identified as the acquisition of priority skills. Most

[83] ISET SETA, 2006; http://www.dol.gov.za.
[84] Ibid.
[85] http://www.labour.gov.za/download/9974/Useful%20Document%20-%20National%20Skills%20Development%20Strategy%202005%20-%202010.pdf.
[86] http://www.labour.gov.za/download/9974/Useful%20Document%20-%20National%20Skills%20Development%20Strategy%202005%20-%202010.pdf).

pertinent to the film and television sector are JIPSA's objectives to produce 12 500 more artisans per year (South Africa currently produces 5 000) until 2010. [87]

The Deputy President reports to Cabinet and the public on both ASGISA and JIPSA's progress. [88] Both strategies operate in tandem with the NSDS.

3.3.3   The National Industrial Policy Framework (NIPF)

NIPF details the sector strategy for the development of content industries. The NIPF supports the broader ASGISA vision of diversifying the South African economy to create a more knowledge-based economy. Regarding cultural industries, the NIPF makes mention of the fact that the cultural industries have the potential to contribute to nation-building and employment creation. The document notes that a lack of standards in training provision is a key constraint in developing the sector. NIPF proposes the development of an Enterprise Development Programme to assist with capacity building and the development of scarce skills. [89]

3.4 Higher Education and Training Institutions

Compared with more academic disciplines, film education is a relatively new phenomenon in South Africa. [90]

Up until the mid-90s only three institutions (two technikons and one private institution) offered film and television training at tertiary level. [91] The new millennium has seen a steady development of film-training provision in South Africa, both formal and in business, though the industry sees it as fragmented and irrelevant. [92]

3.4.1   Public Higher Education Institutions

Public higher education institutions receive differential government subsidisation and support from their ETQA, which is the Council on Higher Education (CHE). Higher education institutions, in turn, have to meet the imperatives outlined by the CHE.
The most significant changes imposed on public highereducation institutions by the current education policy are:
• Mergers, provided for in the Higher Education Amendment Act 63 of 2002; and
• Audits, as per the Higher Education Quality Committee (HEQC).

---

[87] JIPSA Annual Report 2006.
[88] AsgiSA Annual Report 2006.
[89] South Africa. Department of Trade and Industry. August 2007. National Industrial Policy Framework. Available: http://www.thedti.gov.za.
[90] De Beer, Adam. (2005)   Lights, camera, lesson plan: higher education programme design in the film and media environment. MA thesis.
[91] Ibid.
[92] NFVF Indaba 2001; Industry Consultations (2006).

Table 15: Public Higher Education Institutions

Institution	Certificate	Diploma	Degree
Cape Peninsula University of Technology	None	Film and Video Technology	None
Durban University of Technology	None	Video Technology	B. Tech Video Technology
National Media Institute of South Africa	None	Film and TV Productions Animation Studio Operations	None
Nelson Mandela Metropolitan University	None	Journalism	BA; Media, Communication and Culture
Rhodes University	None	None	BA; Journalism
Tshwane University of Technology	Motion Picture Production	National Diploma Motion Picture Production	B. Tech Motion Picture Production. Animation Masters in Technology: Motion Picture Production Doctors Degree in Technology: Motion Picture Production.
University of Cape Town	None	None	BA (Honours) Film and Media Production.
University of Free State	None	None	BA Communication Science in Media Studies
University of Johannesburg	None	None	BA: Audiovisual Production Management Honours: Audiovisual
University of KwaZulu-Natal	None	None	BA, Honours, Masters and PHD in Culture, Communication and Media
University of Limpopo	None	None	BA: (Honours) Communication and Media Studies
University of North-West	None	None	BA, Honours: Communications
University of South Africa	None	None	BA, Honours and Masters in Media Studies
University of Zululand	None	None	BA, Honours: Communication Science
Wits University	TV Broadcasting Certificate	None	BA and Honours in Dramatic Arts BA and Honours in Audiovisual Masters in Dramatic Arts

3.4.2   Private Higher Education Institutions

There are seven private higher-education institutions that offer a range of degrees, diplomas, national certificates, learnerships and short courses relevant to the film industry.

Subsidisation of private institutions is to be deferred until the national standardisation process has been established. These institutions are, however, to be given incentives to become part of the single co-ordinated training system (and to take on all the associated activities of accreditation, assessment and moderation).

Table 16: Private Institutions

Institution	Short Courses	Certificate	Diploma	Degree
AFDA (Cape Town, Johannesburg)	None	None	None	BA, Honours in Motion Picture Medium BA, Honours in Live Performance BA, Honours in Cinematography
Boston Media House	None	None	Diploma in Video Production Diploma in Media Studies Diploma in Research and Sound Engineering	None
City Varsity	Camera Work Writing Scriptwriting Directing Documentary Directing Narrative Editing Multimedia	None	Film and TV Production Tech-niques Sound Engineering Animations TV Drama and Acting Professional Photography	None
Damelin	None	Advanced Motion Picture Production	Motion Picture Production	None
Monash	Creative Scriptwriting Sound, Lighting Editing Audience Research	Film and TV Productions Photography and Camera	None	None
Movietech	Film and TV Produc-tions	Film and TV Produc-tions	None	None
Newtown Film School	None	None	Film Production	None

Access to education for previously disadvantaged individuals remains a setback, as most institutions' tuition fees are high (see Table 17 on the following page). Students are further expected to purchase equipment for themselves, which is also costly.

Table 17: Tuition Fees

Institution Category	Fees
Private Institutions	• R40 000 pa (3-year degree)
	• R30 000 pa (2-year diploma)
	• R4 500 per 3-month beginner course
	• 2-day workshops (range from R1300)
Public Institutions	• R11 000 to R20 000 per annum

3.4.3   Further Education and Training

- The Further Education and Training Act No 98 of 1998 was enacted to regulate further education and training:
- To provide for the establishment, governance and funding of public further education and training institutions;
- To provide for the registration of private further education and training institutions;
- To provide for quality assurance and quality promotion in further education and training; and
- To provide for transitional arrangements and the repeal of laws and to provide for matters connected therewith. The Act merged the former technical colleges, colleges of education and training centres as FET institutions.

While the major restructuring of the FET has already taken place, FET colleges have, for too long, been seen as ineffective and inefficient. [93] FET offers training in six vocational fields (arts/music, business, edu-care and social services, engineering, general education and utility studies); 89% of provision is concentrated in engineering and business studies. [94] No FET institutions offer film and television studies.

3.4.4   Learnerships

Section 17 (1) of the Skills Development Act defines a learnership agreement as an agreement entered into between a learner, an employer or a group of employers and a training provider accredited by SAQA or a group of such training providers for a specified period. A learnership entails three components. Firstly, the learner is placed within an employment environment where he or she is employed for a specified period. Secondly, the employer then provides the learner with the specified practical work experience. Thirdly, the learner attends a specified education and training course provided by a training provider. As long as the above conditions are met, learnerships may take place within formal training-provider settings or at the work place. This is discussed in detail in Chapter 4.

3.5 International Benchmarking

This section outlines how film schools in other countries have been established. It identifies films schools around the world and explores the history and objectives of these establishments. This information provides policy consideration that should inform a potential South African National Film School.

---

[93] Kraak A. (2003) Human Resource Development and skills crisis HSRC
[94] Fisher G, Jaff R, Powell L and Hall G (2000) Public Further Education and Training Colleges p337

3.5.1   Australia

The Australian Film, Television and Radio School (AFTRS)

AFTRS was established in 1973 as part of the Commonwealth Government's strategy to promote the development of Australian cultural activity. [95] The establishment of ARFTRS has contributed to the expansion of training in the arts and media, and to growth in the production and distribution of Australian films, television programmes, radio broadcasting and digital media.

The school was initially subsidised through parliamentary appropriation. However, this changed in 1975 when a range of initiatives were enacted, including the creation of funding agencies to support the film school. The school enjoys strong political and industry support.

Industry partners and supporters, along with individual donors, make a significant contribution to the creative and educational activities in place at the school. The school also supports itself by collecting fees for short courses and the sale of AFTRS training product. [96]

The admission to full-time courses at AFTRS is based on learner competency. As of 2007, AFTRS accepts around 50 students each year to its full-time postgraduates programmes. Courses are organised by 13 specialist teaching departments, and full-time courses are only open to Australian citizens and permanent residents of Australia.

AFTRS offers the following programmes:
- Foundation Diploma – general full-time year course designed for new and emerging filmmakers.
- Graduate Certificate Award Programmes – part-time courses designed to combine work and study.
- Graduate Diploma Award Programmes – part-time and full-time courses only open to Australian citizens, permanent residents, New Zealand residents and holders of humanitarian visas designed for specialisation in specific screen arts and broadcast disciplines to refine their skills.
- Honours and Masters in Arts.

AFTRS also offers short courses designed to give students an opportunity to re-skill or refine their techniques in a specific discipline area. Short courses also give industry professionals and emerging storytellers the chance to hone their skills. The school offers tailor-made professional development programmes – a customised programme of training solutions focused on organisation-specific needs.

In 1994, the school established an indigenous programme initiative to identify and nurture indigenous screen and broadcast practitioners and to increase the number of indigenous Australian producers, directors and scriptwriters. Indigenous scholarships are provided to provide emerging indigenous filmmakers with access to the nation's premier professional screen and broadcast training institution.

The school also has a Centre for Screen Business; a unit of AFTRS formed to promote the development of business knowledge and skills in the screen content industries. The centre offers a 10-month Graduate Certificate in Screen Business to media industry professionals, the first management qualification in Australia specially designed for media and screen professionals.

---

[95] http://en.wikipedia.org/wiki/Australian_Film_Television_and_Radio_School.
[96] www.aftrs.edu.au.

All AFTRS courses are FEE-HELP approved. FEE-HELP is a loan scheme initiated by the Australian government to assist eligible students with paying for their studies. With FEE-HELP, students are able to study without having to pay fees upfront. The student's debt is recorded with the tax office and students repay through the taxation system once their income reaches a set threshold. [97]

3.5.2   United Kingdom

National Film and Television School (NFTS)

Concerned that the UK was being left behind by Europe and the USA, where formal training for filmmakers was already well-established, in 1967 the Department of Education and Science recommended the creation of a national film school. The NFTS was established in 1971 and is based in Beaconsfield. [98]

Until its repeal in 1986, the school was funded partly through a tax on cinema ticket sales and is currently funded by the UK government through the Department for Culture Media and Sports, and the television and film industries. The school has also acquired sponsorships from various broadcasters and the Film Distributors Association.

The NFTS has established partnerships with both government and industry on funding, consultation and liaison and these are meant to ensure that training programmes meet the present and future needs of the industry.

NFTS courses are geared to the needs of people who plan to make their careers in the screen industries. Films made by the graduates are exhibited at film festivals around the country, at the National Film Theatre and other specialist cinemas in the UK. Some of the films are licensed to local broadcasters in the United Kingdom and other territories.

The school offers two kinds of full-time courses for people at an early stage in their careers – a two-year Diploma Course and a one-year Advanced Programme.

The school awards maintenance bursaries and scholarships. These bursaries and scholarships are meant to remove the barriers to entry for students at a financial disadvantage. In addition, a large number of public and private donors fund scholarships to assist (chiefly British and European) students. [99]

3.5.3   United States of America

American Film Institute (AFI)

The AFI was founded in 1967 as a national arts organisation to train filmmakers and preserve America's vanishing film heritage. [100] Initial funding for the school came from the National Endowment for the Arts (NEA), the Motion Picture Association of America and the Ford Foundation.

A dedicated group of working professionals from the film and television communities serve as mentors in a hands-on, production-based environment, nurturing the talents of future storytellers. With an emphasis on narrative visual storytelling and personal expression, each class breaks into teams that mirror a real production environment.

[97] www.aftrs.edu.au.
[98] http://www.nftsfilm-tv.ac.uk/index.php?module=Content&template=history.
[99] http://www.nftsfilm-television.ac.uk/.
[100] www.afi.com/about/history/aspx.

The AFI Graduate programme covers six disciplines: Cinematography, Directing, Editing, Producing, Production Design and Screenwriting. Hands-on collaboration complements the graduate programme and this is used as a primary teaching tool to provide students with an experience close to the real-world filmmaking environment.

The AFI Conservatory experience focuses on narrative, fictional storytelling as the essential foundation on which filmmakers build and shape their professional voices, with emphasis on the genres of fiction, live action drama or comedy. The school arranges internships for its students through its Professional Internship programme to help them gain experience and professional relationships. Internship hosts include major Hollywood studios and shows. The school also host an annual Screenwriters showcase which gives Screenwriting graduates an opportunity to participate in a pitch night to representatives of the film profession, ranging from agencies, management and production companies. [101].

3.5.4 Poland

Lodz National Film, Television and Theatre School

The Lodz National Film, Television and Theatre School was established 1938 in Lodz and is one of the best-known institutions of higher education in the city. [102]

The institution is funded by the Ministry of Culture and National Heritage, the Ministry of Science and Higher Education, the Polish Film Institute and student contributions.

The school provides social grants for students that are economically disadvantaged. The amount of qualifying students who can apply for this benefit is determined in consultation with the Rector of the college student government body. The fixed monthly amount of university income per student in the family may not exceed the minimum threshold.
In addition, there are residential fellowships, scholarships and assistance grants to the board in special cases. A separate source of financial support from the school is incentive grants that are awarded to the best students in each direction, on the basis of average ratings. Scholarship for learning achievements may be awarded without submission by the student. [103]

The curriculum is structured in a manner that effectively combines academic theory with practice. Theoretical subjects such as history and the aesthetics of the film are also offered. Practical exercises ensure interaction between departments. Actors, directors, cinematographers and editors jointly prepare a film, getting to know each other and fostering collaboration.

Professional experience is not required for admission to the school as the college believes that a talented student will be well prepared to start a career in the independent sector. These students' fields of study are, however, paired with their areas of interest. [104]

3.5.5 Mexico

Centro de Capacitation Cinematografica (CCC)

The centre for Cinematographic training is coordinated by the Mexican Institute of Cinematography, a part of the National Council for Culture and the Arts, and is one of the schools that make up the National Arts Centre. It was founded in 1975. [105]

---

[101] Ibid.
[102] www.filmschool.lodz.pl/.
[103] www.filmschool.lodz.pl/.
[104] www.filmschool.lodz.pl/.
[105] http://ccc.cnart.mx/.

The CCC aims to train filmmakers of the high professional level in the areas of technical and artistic direction, production, sound and script editing within a holistic concept of language and film work. Today the school is held in a similar height as the best film schools in the world, its prestige and presence in the film industry is evident in the number of national and international festivals to which its products are invited to participate. The quality provided by their training has succeeded in ensuring that their graduates enter the audio visual and film industry as high-level professionals.

The institution offers scholarships equivalent to tuition fees to deserving students for academic activities, production and dissemination of the CCC. These scholarships are based on academic merit and socio economic needs of the student.

The Film Training Centre produces about 40 films per year and the movies are both long and medium-length, combining academics with elements characteristic of professional production. This contributes to the careful selection of teachers, which incorporates teachers and professionals of the film industry. Besides having been recognised nationally and internationally, these teachers share a passion for teaching and training in the field of cinematography.

Annually, the films and videos produced by the school are promoted at numerous film festivals and exhibitions at national and international platforms.

The CCC seeks to strengthen links between academic works with over 200 educational institutions in the audiovisual field all over the world. The institution is actively involved in the discussion of methodologies and tools for teaching film and is inserted in research and production that are generated worldwide, not only for the benefit of their students but also for the teacher. [106]

Regularly guest teachers are invited to teach courses and workshops to generate and maintain permanent relationships with film schools around the world. CCC has also established academic exchange programmes with institutions around the world.

The school offers a four-year General Course in Film Studies divided into 12 academic quarters. The academic plan of the course consists of a common trunk of two years, which provides materials for the teaching of film and theatrical expression and narrative documentary. After the common trunk, the third year, students can opt to take the following specialties: Direction, Cinematography, Postproduction (Sound Editing) and Production. Upon completion of this course the student can obtain a diploma (with official recognition of validity) by submitting the relevant professional examination.

3.5.6   Ghana

The National Film and Television Institute (NAFTI)

NAFTI in Ghana was established in 1978 by the government of Ghana as a public institution of higher education in film and television production. The school has a campus spread over three studios in Accra. [107]

Since its inception, NAFTI has fostered professional and academic excellence in film and television education. The institution has maintained this high level of performance over the years and consequently has drawn students from many parts of sub-Sahara Africa. Thus, NAFTI's graduates have been influential in shaping the film and television industry in Ghana and in Africa.

[106] http://ccc.cnart.mx/.
[107] www.nafti.edu.gh/.

The institute recognises its unique role in the development and propagation of African culture and therefore encourages each student to develop his creative talents to be able to face the challenge of producing materials that reflect the spiritual and intellectual aspiration of the African people. In order to accomplish these goals, NAFTI provides its students with modern facilities and equipment.

NAFTI aspires to maintain and further establish a reputation for excellence in film and television education, and also aims to be a worldwide model for other regional institutions of higher education, thereby attract more funding and other forms of support. [108]

3.6 Findings

Indications from interviews are that the current institutions of higher learning cannot meet the educational needs of the South African film industry. With the exception of the Tshwane University of Technology and the University of Cape Town there is no public institution that has a dedicated department of film studies. Most of the institutions offer film either as part of media studies or as part of English studies, making it difficult for students to specialise. They are also not adequately equipped, and do not have state-of-the-art equipment. There is a particular problem with sound-editing, which has a reputation for being the worst subject of all the film schools. [109]

According to Botha [110] a disturbing feature of private education is that they private lack quality assurance control, whereas public institutions go through various quality control assurances such as the training and qualifications of personnel. Private institutions also tend to overemphasise practical training over theory, while public institutions lack infrastructure which leads to students graduating with different basics. Currently there is no private film school that teaches documentary filmmaking.

Another concern raised by interviewees is that some institutions enrol a high number of students, thus compromising the quality of education as individual attention becomes unattainable. Student enrolment should be done through a selection test which does not only test academic ability but should also look at the knowledge and passion of the industry.

The school should be more representative of the industry, have links with African countries and be positioned with certain production companies and broadcasters. It should also have a teaching staff comprising of local people and at least a few from the continent. It is important that the film school become a member of Centre International de Liaison des Ecoles de Cinema et de Television (Cilect) to share knowledge.

3.7 Conclusion

The South African education system has undergone major restructuring since the advent of democracy in 1994. The promulgation of the Higher Education Act introduced a structured higher education system, with programmes and institutions that are intended to better respond to the human resource, economic and developmental needs of a democratic South Africa.

One of the objectives of the Act is to ensure that education becomes accessible even to previously marginalised individuals; however this still remains one of the failures of the current government as this study uncovered the expensive nature of education.

---

[108] www.nafti.edu.gh/.
[109] Leon Von Nierop; Tshwane University of Technology. Industry consultations 2006.
[110] Dr Martin Botha; University of Cape Town. Industry consultations 2006.

These research findings present a gloomy picture in terms of film education provision. Most schools do not have state-of-the-art equipment, and some only offer film education as part of English studies. The situation has led to institutions producing graduates with different basics: some graduates are more technically inclined, while others are theoretically biased.

Weaknesses identified by the study are that some institutions are more interested in enrolling a high number of students and, in the process, compromise on the quality of education offered. The report further notes poor links within the industry as another major weakness of South African universities in general.

A successful National Film School has to have links with the industry and become affiliated with global film schools in order to share knowledge and information. A number of film schools across the world are identified for benchmarking and a common denominator among them is that they have been established to preserve their country's culture and are government-funded. They have contributed substantially to the development of the film industry in their respective countries.

Chapter 4:
Industry Skills Analysis

4.1 Introduction

The aim of this chapter is to provide an overview of skills needs, skills development, recruitment trends and graduate absorption in the film and television sectors. The two sectors are dealt with conjunctively because of discernible skills requirements, economic activities and issues that have an impact on skills development, and the many similarities relevant to both sectors.

Occupations that fall within news and actuality are excluded from this discussion because they have strong journalistic skills requirements that did not form part of this study. There are, however, occupations that fall within this genre, which are relevant to the general scope of the study because practitioners in these fields also work in the broader television sector.

4.2 Skills Overview

Practitioners often move from one company to another, depending on job availability, owing to the volatile nature of the film and television terrain. According to the respondents, most industry practitioners do not receive employment benefits and can be unemployed for months at a time. Job opportunities can range from anything between a day to a year or more, depending on the occupation and the type of production.

4.2.1 Foreign Productions

Feature film activity in South Africa is low and typically involves an extremely specialised skills base. Many oversees productions are making their way to South Africa's shores due to the cost competitiveness of South Africa and the wonderful locations. [111]

According to the respondents, work on foreign films is avidly sought because of the quality of production, high esteem and good international rates. Local producers who work on these films come highly recommended by the crewing agencies that have previously placed them or from film services producers that have worked with them before, and consider them skilled enough to work on foreign productions. Some local producers are able to get work on these films if they have worked on high quality television productions or local or international commercials.

Producers that have experience on lower-budget television productions find it difficult to enter into high-end productions because their skills are considered incompatible. Their appointments would be regarded as risky, owing to their lack of experience in working with large-budget productions.
Due to the seasonal nature of foreign film production, producers that do work in this field often have to work on lower-budget television productions to sustain their annual income.

Graduates that have a good institutional track record or who start at the bottom in these productions have a good chance of succeeding if they continue to work within this format, improving their skills, and can earn more or be given jobs with more responsibilities. Moving up the ladder can take a long time because such films are not very frequent.

---

[111] For a detailed discussion of the foreign production activity in South Africa see Section 2 of this document.

South Africa boasts a pool of highly rated, technically skilled production personnel such as sound technicians, grips, gaffers, and assistant camera operators. However, Heads of Departments (HODs) are usually sourced in the countries where the films originate because of a perception that South African HODs do not have the skills that meet international standards. Similarly, most of the post-production activity takes place in the country of origin because of the low level of local facilities and lack of skills of an international standard.

In short, experience on the high-budget international productions is gained by prolonged work, exclusive to this format.

4.2.2   Local Productions

There is a high demand for local film productions yet the production volume of local films is still too low and lagging far behind to meet this demand. This is because of the large investments that film productions require and the low audience consumption of local film products. This is possibly perpetuated by the low volume of funding that goes into local film budgets. Distribution is also a highly contributing factor to the low revenue streams because there are still no significant means of widely distributing the local film product or exploitation across all revenue streams. South African filmmakers require large budgets to produce films that hardly ever recoup their production costs; the exhibition market is largely dominated by American productions.

When a local large-budget film begins production, the production companies involved are generally those with experience in servicing large-budget foreign feature films because of their international experience and lower associated risk. Similarly, the practitioners that work on these films have experience on foreign productions.

4.3   Skills Needs

Respondents mentioned different skills requirements and gaps according to their experiences and the types of productions they were working on. For instance, respondents who worked mostly in drama series complained of the lack of writers who had the right balance of creative and technical skills. Respondents who worked on studio productions complained of a lack of technologically and technically skilled personnel with the right experience for this genre.

A wide range of positions were hard to fill in 2006. [112] From the 106 respondents, 50% attributed the difficulty to filling their vacant posts to inadequately experienced personnel. A further 30% related it to the generally low quality of skills in the industry and 15% identified the current crewing rates as a hedge to procuring experienced personnel.

Most respondents agreed that there was a lack of transformation throughout the sector's value chain. Similarly, the MAPPPSETA Sector Skill Plan Update 2007/2008 revealed low levels of previously disadvantaged personnel across all occupations.

Respondents also expressed lack of skills within the current workforce, in the sense that practitioners who were employed in the industry lacked crucial skills to perform their jobs. Therefore, the most relevant intervention would be the skills development of practitioners who already have experience in the industry. Yet this counteracts the efforts to redistribute skills, experience and knowledge to previously disadvantaged individuals.
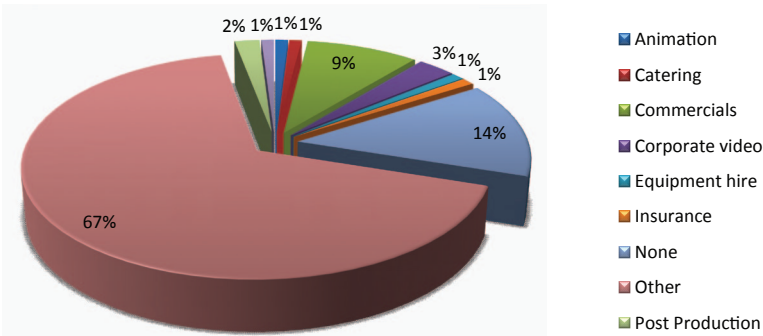
---

[112] For a list of these positions, see Annexure 1

Figure 9: Company Main Business Activity
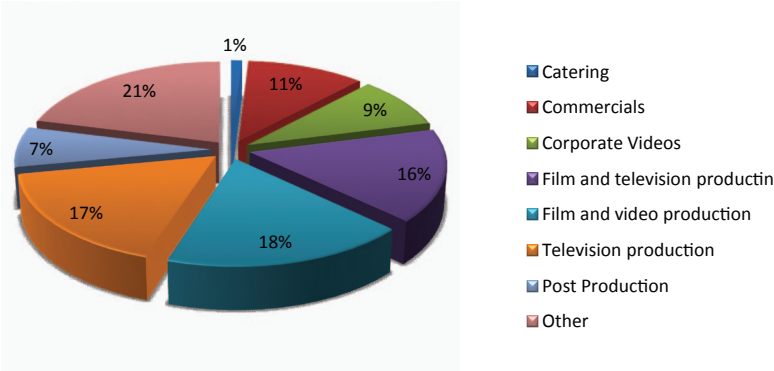
As shown in Figure 9 above, 18% and 17% of the respondents were from the film and video production and television production respectively.

Figure 10: Companies Secondary Business Activity

According to the survey, 67% of companies had a secondary business activity ranging across sales and marketing, crewing and casting agencies, legal services, training and events management or location scouting as shown in Figure 10 above.

Figure 11: Companies Establishment Period
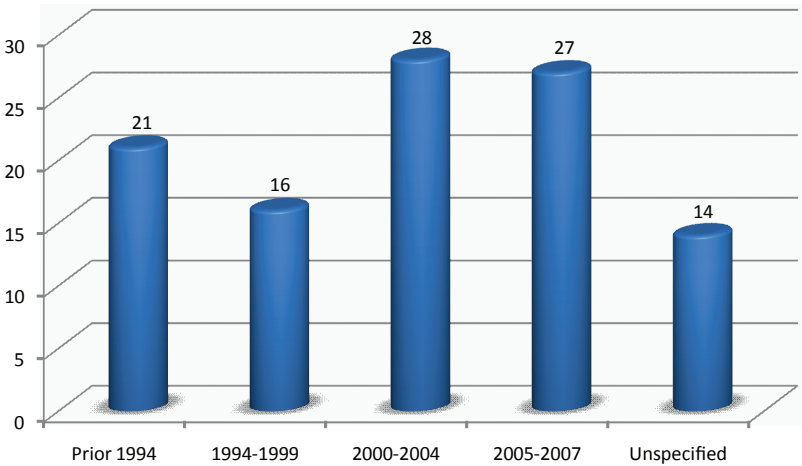
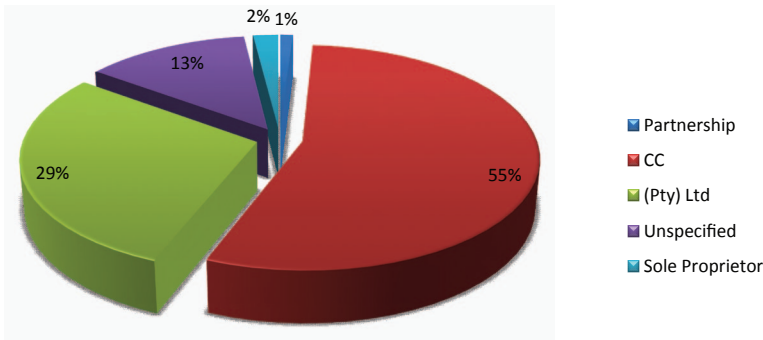From the 106 companies that responded, 33% of the industry companies were established between 2000 and 2004, 27% of them before 1994, 21% between 1994 and 1999, while only 18% were established within the past three years. Figure 11 above shows the period which companies were established.

Figure 12: Companies' Legal Status

As shown in Figure 12 above, of all the companies surveyed, 55% were registered as close corporations, 29% as private companies, 2% as sole proprietors and only 1% as partnerships.

Figure 13: Location of Head Office
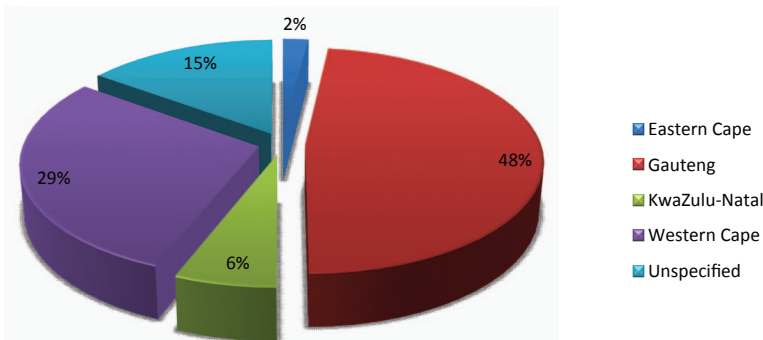
As with employees, the bulk of the companies were located in Gauteng, followed by the Western Cape, then KwaZulu-Natal and the Eastern Cape. However, film activity does not extend to all provinces. From the survey, 48% of companies indicated that they had branches in Gauteng, 29% in the Western Cape, 2% in the Eastern Cape and 6% in KwaZulu-Natal, while 15% of those companies did not specify the location of their head offices. In addition, some companies (9%) mentioned that they had branches outside South Africa.

According to Figure 14 that follows, 80% of respondents indicated that they had skills problems in their companies while only 20% indicated the opposite.

Figure 14: Skills Shortages in Companies
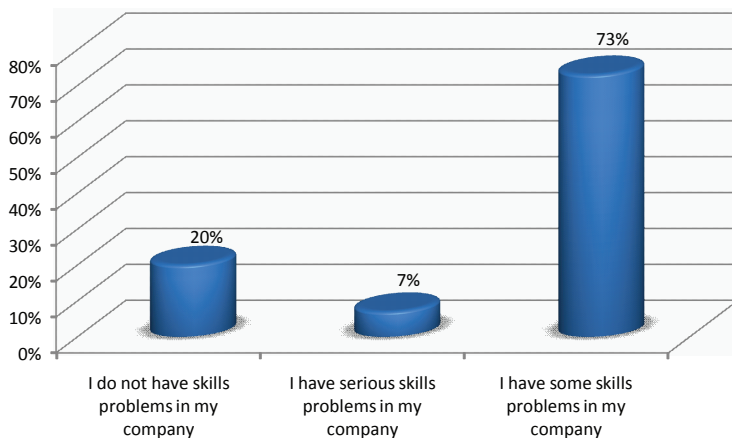
To address skills needs in their companies, as illustrated in Figure 15 below, 87% of companies indicated that they facilitated training in the form of learnerships, mentorship, internships, short courses and train-the-trainer programmes. Only 3% focused on train-the-trainer programmes.

Figure 15: Training Offered or Facilitated in 2006
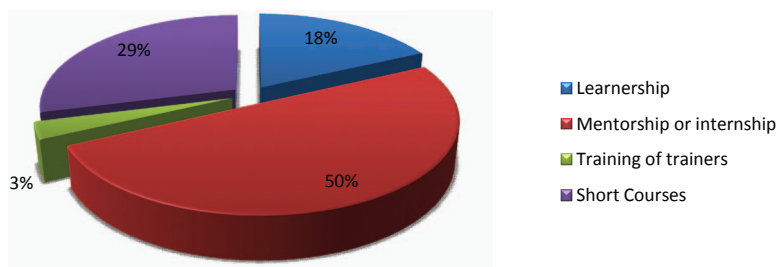
As illustrated in Figure 16 below, of the training that was conducted, 39% was directed at the creative department, while production and technical departments received 31% and 21% respectively.

Figure 16: Department that Received Training in 2006
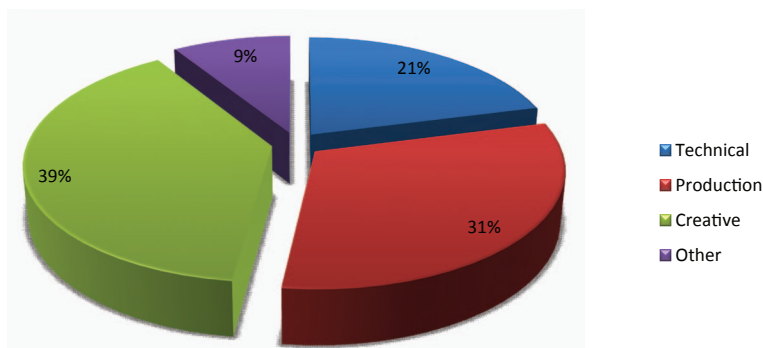
Of the remaining 17% of companies that indicated they did not facilitate any training in 2006, 25% indicated that they did not conduct training because it is expensive.

Figure 17: Reasons for Not Offering Training in 2006

	There is not enough time to train	Training is expensive	Other	Do not know how to access training opportu-nities	Training has not had any impact on perfor-mance in the past	There is no relevant training	Staff and crew are fully proficient
	30	25	25	16	3	6	2

4.3.1   Skills Needs in the Film and Television Industry

Good film producers and creative practitioners are considered scarce. In general, there is demand for practitioners across the industry who have high creative or technical ability to work within high production value feature films. It is not surprising that there is demand for high-skilled practitioners, black HODs, multi-lingual scriptwriters, performers and editors in the film and television industry. There is also a dire need for practitioners who possess good financial management and negotiation skills, as these form part of the value chain.

The following lists the most prevalent perception of skills requirements in the positions that were hard to fill.

Table 18: Hard-to-Fill Positions and Required Skills

Positions	Required Skills Attributes
Producers	• Can work with large budgets
	• Know international markets and can work on co-production deals
	• Have good distribution and sales skills
	• Able to access and manage funds
	• Have good legal background
	• Have good project management skills
	• Specialise in drama, feature film, dubbing and new media
Screenwriters	• Have creative breath
	• Have good writing skills that are on par with international standards
	• Can write for broader audiences
	• Have knowledge of different genres
	• Have strong creative ideas
	• Specialise in indigenous languages
Cinematographers	• Have good creative lightning skills
	• Have good colouring and framing skills
	• Storytelling technique
	• Ability to shoot on film as opposed to digital camera
HOD's	• Able to work with large budget feature films
	• Have good project management skills
	• Have high creative and technical abilities
Editors	• Specialise in TV drama, documentaries and feature films
	• Have good creativity (storytelling ability)
	• Have good technical skills
Animators	• 2D (cell) animators with good drawing skills
	• Have strong technical skills to use highly sophisticated animation software and industry experience
	• Voice artist
	• 3D lighting expertise

4.4 Skills Development Initiatives

The discussions below highlight the different kinds of skills development initiatives that exist around the country.

4.4.1 On-the-Job Training

Companies that have sustainable skills development programmes are those that have shown initiative and interest in developing skills. Most of these companies are well-established and have fairly high production volumes. As a result, they are able to afford to train new entrants or upskill existing practitioners.

Skills development within companies is often dictated by skills deficiencies that have had a negative impact on production capacity and business growth. Companies are forced to train

practitioners according to their required level so that they can maximise their own production volumes and quality.

On-the-job training varies from informal to structured training formats. Assistantship, which involves a lower-skilled practitioner working with a highly skilled practitioner who is able to transfer skills during production, is considered most favourable because experience in the industry is seen as more relevant than formal training. The assistant is able to learn new skills while gaining experience and, sometimes, earning an income. The assistant is gradually skilled up to a level where he or she is able to handle work independently. In a stable environment, the assistant is able to move up the rungs, getting higher positions and rates.

However, this can be difficult when low budgets do not allow for the employment of assistants and companies cannot afford to pay practitioners anything outside the production budget. Most respondents felt that, if budgets factored in the employment of more assistants, there would be increased skills levels and more room for transformation.

Respondents who had in-house training initiatives said that other companies often poached their trained practitioners, once they were skilled, offering them better wages. This results in companies not offering in-house training, so as not to lose their 'investments' to companies who do not train their own staff. These practitioners sometimes returned to the company where they were originally trained, demanding higher pay.

Some companies acquire new graduates who have enough technical skills to be able to perform jobs on productions. These graduates, eager to acquire industry experience, are usually paid entry-level rates. In some instances, companies hire "cheap labour" from institutions, instead of experienced practitioners, in order to save costs. This works favourably for new entrants who are able to gain industry experience and then seek better employment with higher pay.

4.4.2 Mentorship

The meaning of mentorship seemed to be a contentious issue among respondents who could not reach consensus on what it entails. Some respondents regarded mentorship as a form of job shadowing, while others saw it as entailing skills transfer from a highly skilled to a lower-skilled practitioner. In some instances, mentorships were unstructured and involved new entrants lurking around the production office or set, hindering productivity. In other instances, new entrants, who were supposedly being mentored, ended up performing basic chores such as making coffee and not learning any necessary skills for the occupation.

Some respondents were of the opinion that mentorships only worked if the mentor was truly willing to transfer skills, as opposed to being forced to do so. Respondents also mentioned the difficulty of mentoring new entrants who did not have the same "background" as theirs.

It is also difficult to ascertain skills transfer when mentorships are not structured or monitored, and in the instances where those being mentored do not actually get to do the job. It is difficult to ascertain whether mentored practitioners do, in fact, receive the experience that makes them employable by the end of the programme.

4.4.3 Learnerships

Learnerships are much more structured forms of training, where entrants are placed into a structured learning environment, with an on-the-job training element. In most instances, learners are paid a monthly stipend and supervised by experienced practitioners.

Learnerships usually have a structured curriculum that involves performance assessment throughout the duration of the programme. There are many learnerships, mostly funded by the MAPPP SETA, that take place over a period that can vary between a month to a year.

Most learnerships are geared towards entry-level training that usually entails the recruitment of aspirant practitioners who have little or no experience in the industry. This form of training has received varying forms of criticism because of its unsustainable nature. Some experienced practitioners feel that the accelerated training of people, who have little or no prior experience in the industry and sometimes no formal qualification, does not result in employability. At the end of the learnerships, most learners find themselves unable to secure employment because they are still deemed inexperienced. Many people have become "career learners", hopping from learnership to learnership and never entering the workplace. Some respondents consider the stipend an incentive for people who have no interest in the industry, to earn money by entering into learnerships. Often, the selection process is not rigorous and results in the "wrong" candidates being chosen.

Some respondents feel there is too much entry-level training that does not meet industry needs, while mid-level practitioners are not offered training to improve the skills they already possess. There have been, however, many learnerships that did result in sustainable skills transfer and employability.

4.4.4 SEDIBA

This programme emanated from the Audiovisual Entrepreneurship for Africa (AVEA) and it's directed mainly at producers, although writers also form part of the programme. It can be argued that SEDIBA is one of SA's film training success stories; having been in operation for several years and for producing content that has been aired by the public broadcaster which yielded high Audience Review (ARs).

SEDIBA's successes can be attributed, among other things, to the mentorship received by its participants.

An accomplished practitioner closely mentors each writer's project and the skills transfer is facilitated by focused feedback and tasks. The project can also be commended for its flexibility in accommodating the different needs of the participants. Recognising that writers in the SA context are forced to develop into producers, SEDIBA has since amended its curriculum to allow for the development of production skills by the participants.

4.5 Factors Influencing Skills Development in the Film and Television Industries

This section highlights some of the factors that were attributed to hampering the potential growth of the film industry.

4.5.1 Transformation

Most respondents listed transformation in the film and television industry as the biggest obstacle to skills development. This applied to most occupations across the industry. There was concern that black people are generally viewed as under-skilled and perpetually in need of training, as opposed to being employable participants in the sector.

4.5.1.1 Heads of Departments

Lack of transformation can be equated with a lack of black HODs. While there are many black people who are employed in lower level positions, the HODs are mostly white. This is further compounded by the difficulty of new practitioners to advance to higher level positions.

4.5.1.2 Communication

Lacking strong verbal and written communication skills is often regarded as the reason for black practitioners not being employable.

4.5.1.3 Business Ownership

Transformation in business ownership is slow. Existing companies have the historical advantage of being well-established and sustainable but new businesses often cannot survive the inconsistent nature of work supply. Business is still mainly white-owned and, because of the informal recruitment practices in the industry, job opportunities are often not disseminated fairly.

4.5.1.4 Local Content Knowledge

This generally affects the entry-level positions in production, such as production assistant or co-ordinator.

The ICASA local content quotas have led to considerably increased demand for African language content and this has directly increased the need for black practitioners. It is in the business interest of production companies to hire and train practitioners who can work on and understand local content.

4.5.2 Audience Research

Extensive market research could contribute to the production of content that would appeal to the existing audience and might develop new target markets. This could lead to a more sustainable film industry that would recoup costs and produce more films for different types of audiences. Market research could foster distribution models aligned to audiences, creating opportunities for the production of niche content

4.5.3 Industry Growth

The growth of the film industry would introduce more business opportunities to more production companies and to new entrants, thereby facilitating transformation. The film industry's growth would lead to higher production volumes and strengthen the afore-mentioned benefits.

4.5.4 Access

Most respondents listed the inability to drive a car or the lack of a driver's license and not having equipment to do the job as one of the reasons for not getting a job. As a result of low budgets, production companies prefer to hire practitioners who own their own vehicles or equipment relevant to their job, to save costs.

4.5.5 Low Production Volumes and Unstable Business Environment

Low production volumes and the seasonal nature of industry activity force producers to save as much money as possible by doing most of the work themselves, paying low rates and forcing shorter production periods on current production, in case there is no new business. There are multiple consequences that directly affect skills development:

- Opportunities to train new entrants and existing practitioners are limited when budgets are low, and when production companies cannot afford to risk giving training to inadequately skilled practitioners;
- Practitioners are forced to job-hop, instead of honing their skills and specialising in a particular area because. When a production ends, they often cannot be employed elsewhere in the company;
- Similarly, new entrants find it difficult to find work in the industry because existing practitioners are also searching for work;
- Low production volumes mean that existing and experienced production companies have a competitive edge over winning production projects, making it difficult for new companies to enter and stay in the industry;
- Because broadcasters largely hold copyright ownership, production companies and content creators are unable to exploit intellectual property in other territories and distribution platforms. This limits earnings of the production fee on commissioned projects;
- Without new companies, the industry does not grow or transform and the same industry players have the economic advantage. The sustainability of new companies is directly related to increased job opportunities for new entrants and to the production of more diverse, niche content; and
- This effects the ability of practitioners in this sector to stay up-to-date with new technological and other developments that will affect their careers.

Some companies are able to diversify and to service sectors outside the film and television industry, so that they may sustain their businesses.

4.5.6 Post-Production and Distribution

The visual and audio quality may be compromised at this stage of production if adequate technologies and skilled personnel are not procured for this activity. Budgetary constraints are the primary source of the problem. Yet if sufficiently skilled labour is available, then these are challenges whose effects can be cushioned.

An opportunity lost for most, if not all, locally produced film is in the marketing and distribution phase of production. It is a generally observed concern that local film cannot accumulate the same distributional opportunity as its American competition and this suggests stagnation in distributional growth.

4.6 Recruitment Patterns and Graduate Absorption

Practitioners in the film and television industry are generally recruited by recommendation. Producers (who often take on the role of Human Resources practitioners) prefer to work with tried-and-tested practitioners, to ensure a smooth production and lowered risk. Heads of Departments, who are handpicked because of their show reels and/or work experience and/or recommendation, often have a list of practitioners with whom they prefer to work. The producer often has to grant the HOD his or her 'wishlist', to ensure that production goes smoothly and once again to foster a good working environment.
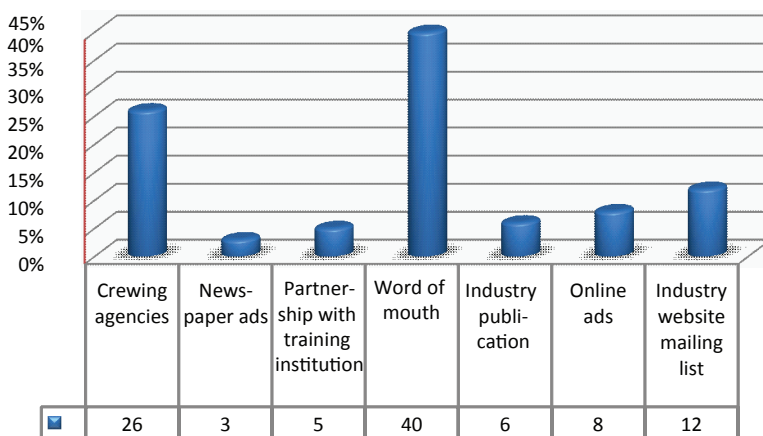
Employment seekers who apply for positions advertised in the press or industry publications are usually thoroughly reference-checked and are, as a result, also recruited by recommendation. This leaves very little opportunity for new graduates or inexperienced practitioners to enter the workplace. Then, without experience, practitioners are very often unemployable.

So, there is very little opportunity of entering the job market if you do not have previous work experience, have not been recommended by your training institution or do not have the relevant industry links.

Because of the ad hoc nature of the industry and the lack of financial sustainability, enforcing a blanket recruitment process would not, practically, be viable.

### 4.6.1   Preferred Methods of Recruitment

Figure 18: Preferred Methods of Recruitment

	Crewing agencies	News-paper ads	Partner-ship with training institution	Word of mouth	Industry publi-cation	Online ads	Industry website mailing list
◼	26	3	5	40	6	8	12

As illustrated in Figure 18 above, the most common method used by respondents to recruit staff was word-of-mouth at 40%. Another 26% of the respondents made use of crewing agencies and 11% found potential employees via websites or mailing lists.

Most of the respondents listed experience and skills as the major determining factors in landing a job in the industry, followed by good references, production requirements and the production budget, considered in that order. Formal film qualifications, compliance and contractual issues only played a minor role in becoming employed in the film and television industry. Figure 19 that follows reveals factors that respondents indicated influence recruitment decisions.

Figure 19: Factors Influencing Recruitment Decisions

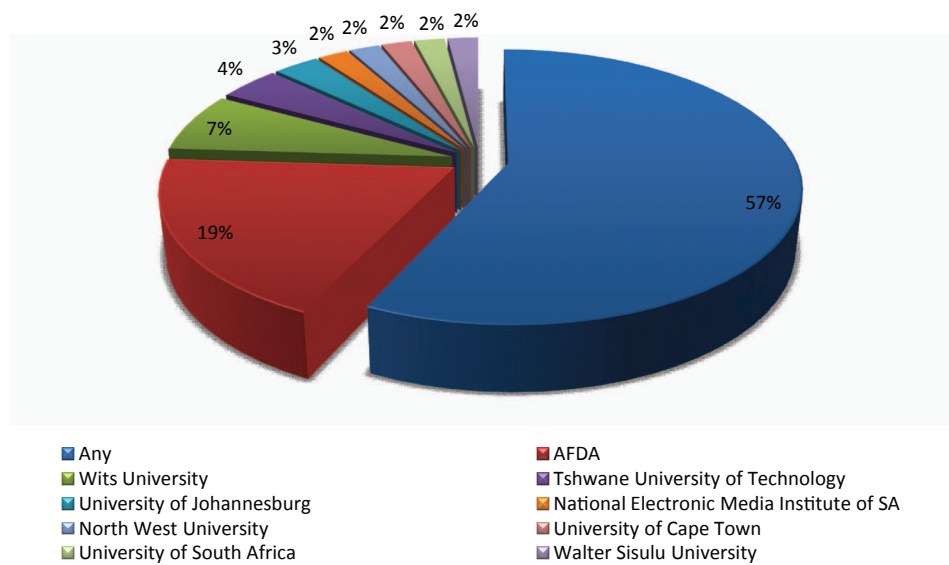|	Compliance or contractual issues	Experience and skills	Formal qualification	Good reference	Production budget	Production requirements
	5%	25%	4%	24%	19%	23%
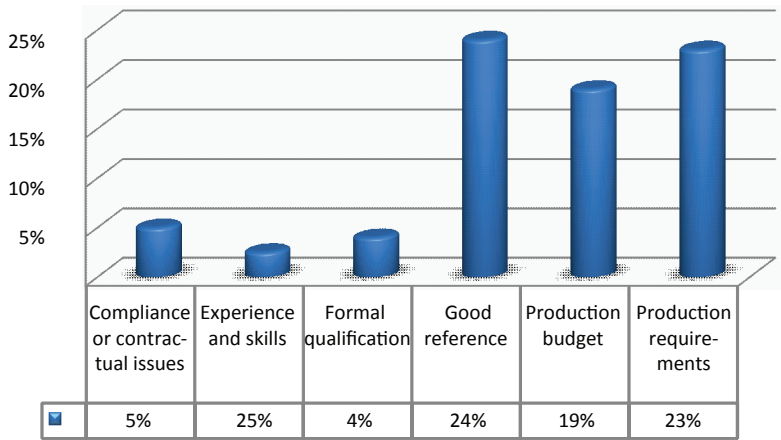
4.6.2 Preferred Institutions

Although 57% of the respondents indicated that they had no special preference for institutions when recruiting graduates (Figure 20 below), AFDA seemed to be the leading institution for supplying graduates to the industry, at about 19%, while Wits University was the next preferred institution at 7%.

In general, companies preferred the graduates from these institutions because they produced future employees with higher technical skills, some because those institutions gave students access to the industry or because they produced graduates with critical skills. Figure 20 shows the distribution of institutions where companies prefer to recruit graduates.
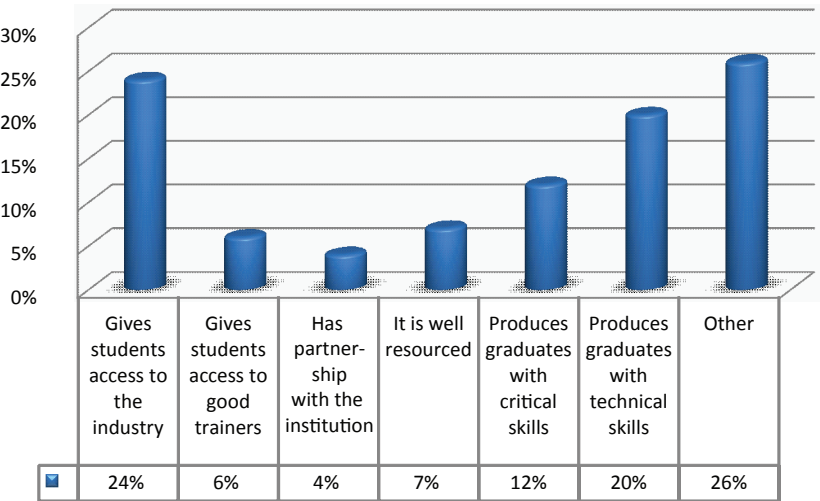
More than half of the company respondents (54%) had recruited graduates over the past year.

Figure 20: Preferred Institutions for Recruiting Graduates

Any
Wits University
University of Johannesburg
North West University
University of South Africa

AFDA
Tshwane University of Technology
National Electronic Media Institute of SA
University of Cape Town
Walter Sisulu University

From the 43% of respondents who indicated that they prefer graduates from certain institutions, the most popular reason them was that those institutions gave students access to the industry. Figure 21 below shows reasons stated for preferring graduates from certain institutions.

Figure 21: Reasons for Preferring Graduates from Certain Institutions

	Gives students access to the industry	Gives students access to good trainers	Has partner-ship with the institution	It is well resourced	Produces graduates with critical skills	Produces graduates with technical skills	Other
	24%	6%	4%	7%	12%	20%	26%

4.6.3 Perceptions about Graduates and Current Training

The older respondents were self-trained and did not have formal qualifications. They considered current education and training far removed from the realities of the industry. New graduates were regarded as unprepared for employment and in need of more training that was relevant to the industry.

According to the respondents' background and company activity, attitudes towards the level of skills possessed by graduates varied. Some respondents considered graduates from certain institutions as lacking creative and conceptual skills, while others considered graduates from certain institutions as lacking technical skills. The preference of graduates varied according to the type of activity the respondents were involved in. Therefore, it can be concluded that some training was considered relevant.

Some respondents preferred to employ people with an academic background and a solid grasp of the theory of filmmaking, as opposed to trainees from learnerships, who had only completed secondary education. In those instances, respondents complained that the trainees lacked communication skills and knowledge of the industry.

There was a general consensus that graduates from higher education institutions had little or no knowledge of the industry and had unrealistic expectations of how to fit into the industry. Graduates expected to enter the industry and perform occupations they were trained in, while the industry values experience over academic qualifications.

Other respondents regarded film and television higher education irrelevant and preferred to work with people who had some passion for the industry and showed initiative, despite any lack of formal qualifications. They indicated that these candidates had no prior false expectations of the industry and were open to learning new skills.

When asked if graduates have the required critical-thinking ability, 37% of the respondents indicated that graduates do not have the required critical-thinking skill. 51% of respondents were of the view that graduates were able to gain and apply new skills on the job. Figure 22 below shows perceptions about graduates.

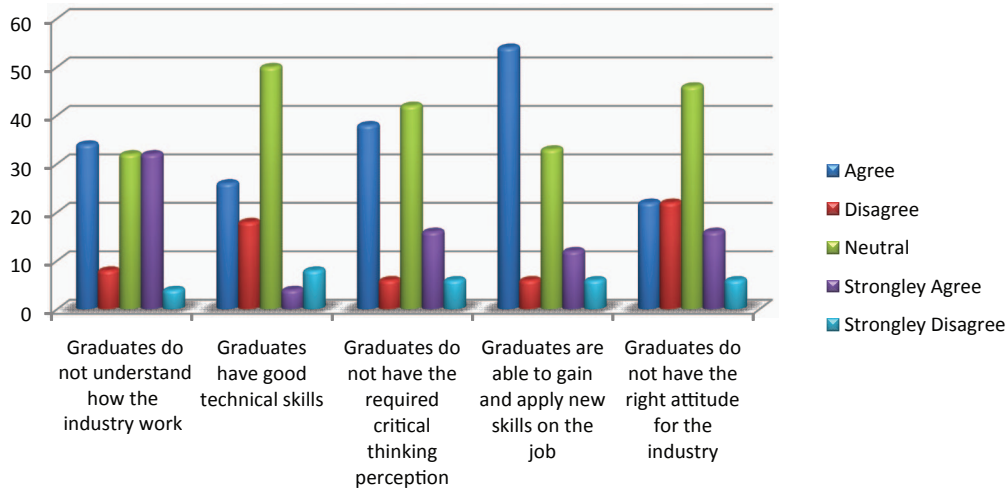**Figure 22: Perceptions about Graduates**

Figure 22 above answers the question of what the recruiter thinks about graduates' skills and competencies. Although the picture is dim with regards to the graduates' understanding of the industry, having the necessary technical skills and critical-thinking ability, one very positive perception is that the graduates are able to grasp and apply new skills on the job.

Figure 23: Race and Gender Distribution

	African	Coloured	Indian	White
■ Female	8%	4%	4%	60%
■ Male	28%	6%	2%	43%
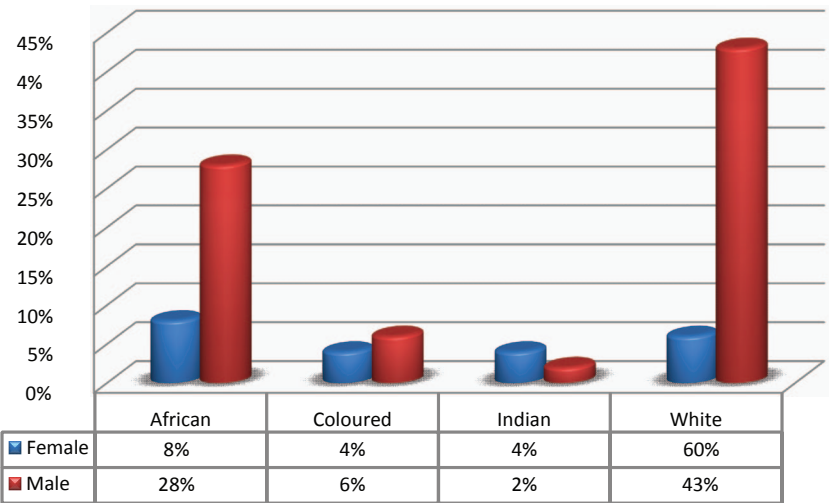
As shown in Figure 23 above, 49% of the respondents were white, and 36% were black. Coloureds accounted for 10% and Indians 6% of the respondents. Males constitutes a higher percentage at 79%, compared to females at 21%, and 6% of the respondents indicated they were disabled.

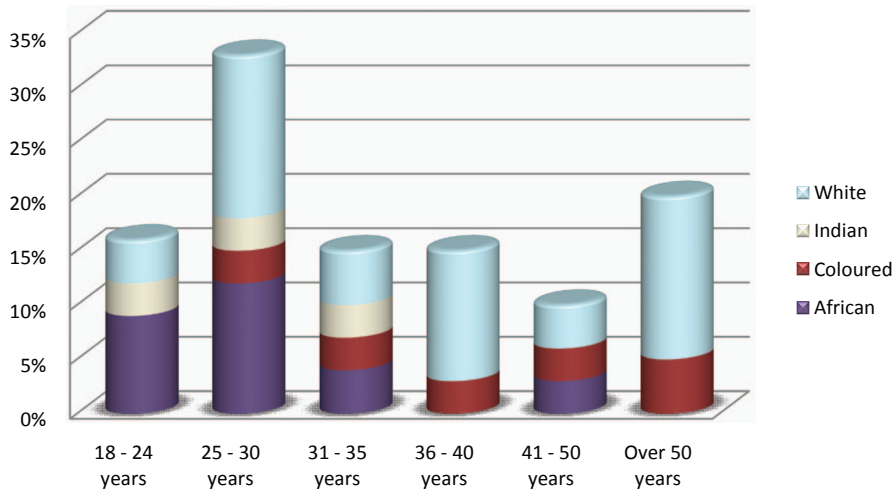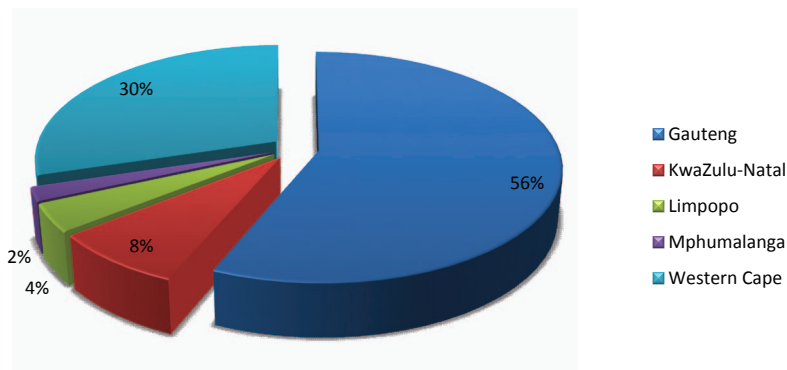**Figure 24: Age and Race Distribution of Respondents**


Figure 25: Provincial Spread of Respondents

Gauteng was the residence for the greater amount (57%) of respondents, the Western Cape accounting for less than a third (30%). A small percentage (8%) resided in KwaZulu-Natal and there were not many in Mpumalanga (2%) and Limpopo (4%). Figure 25 above shows spread of respondents by province.

4.6.4   Current State of Employment

Figure 26 below shows employment status by race and in accordance, 64% of respondents indicated that they were currently employed in the film and television industry, as opposed to 36% who were not employed and were seeking employment opportunities in the industry.

Figure 26: Employment Status per Race

	African	Unspecified	Coloured	Indian	White
■ Employed	14%	20%	3%	1%	26%
■ Unemployed	8%	19%	2%	2%	5%
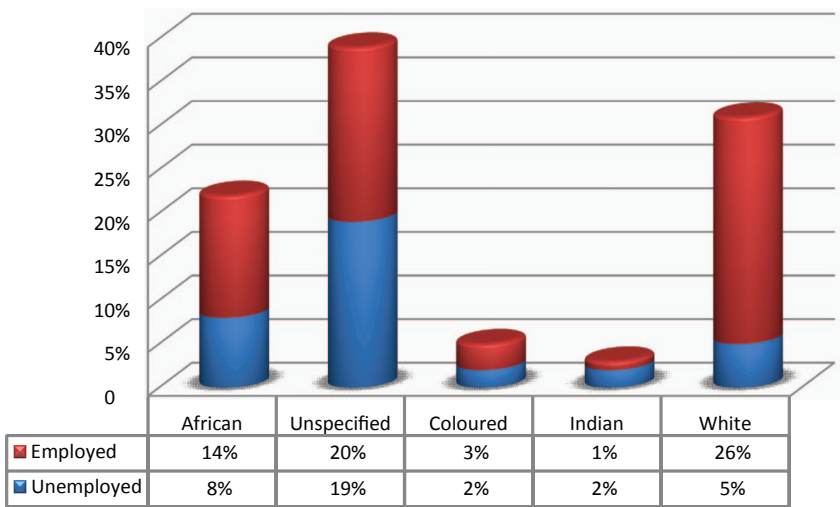
From the figure above, it is clear that there is still a great deal of imbalance to employment as far as previously disadvantaged and black persons are involved.

Figure 27: Period of Unemployment
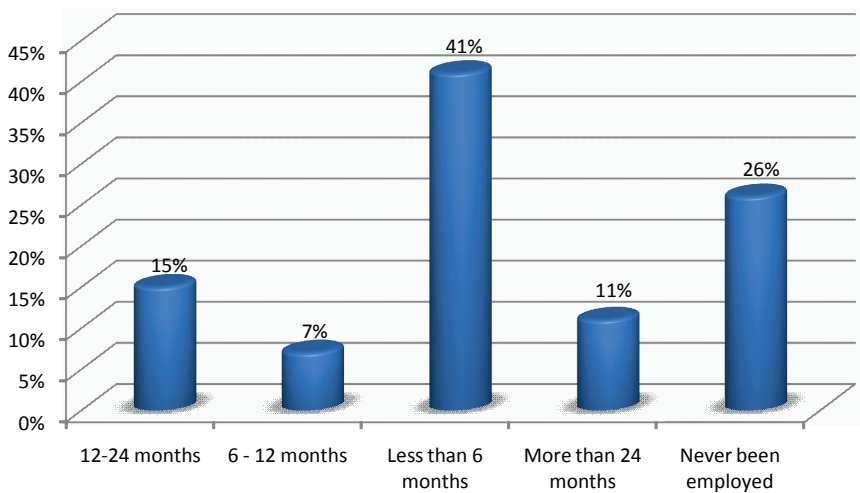
Reasons given for not being employed ranged from being in-between productions, not knowing the right people and not having experience. 43% of respondents had been unemployed for just under six months, while 30% of the respondents had never been employed.

When questioned about the number of years the respondents spent in their current position (Figure 28 below), 28% state that they have been employed in their current jobs for over ten years, while those that stayed in the same jobs for between five and ten years amounted to 18%. 14% said they had had their current positions for anywhere between one and five years. The lowest percentage (12%) had only been in their current positions for a few months or less than a year.
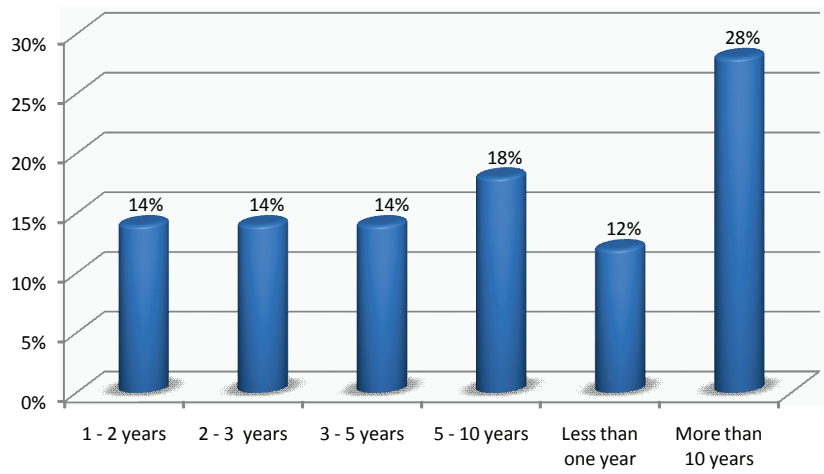
Figure 28: Number of Years in Current Position

Figure 29: Most Recent Production Work

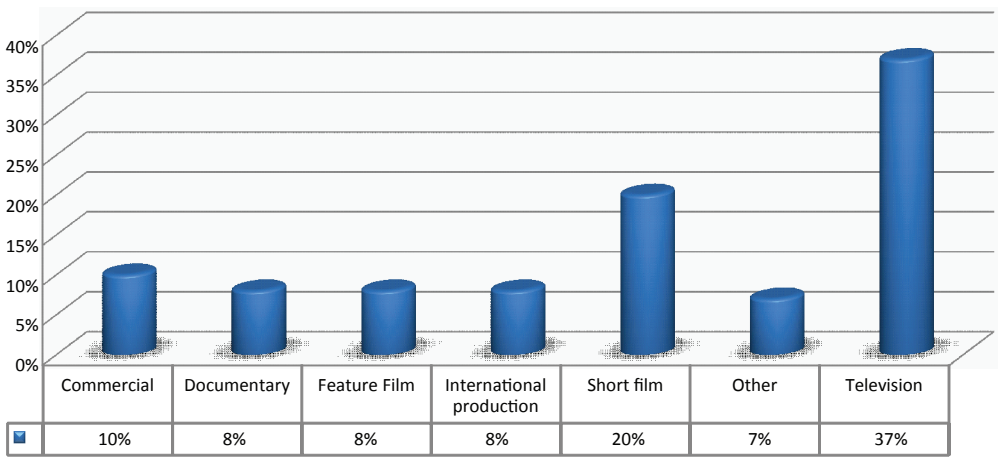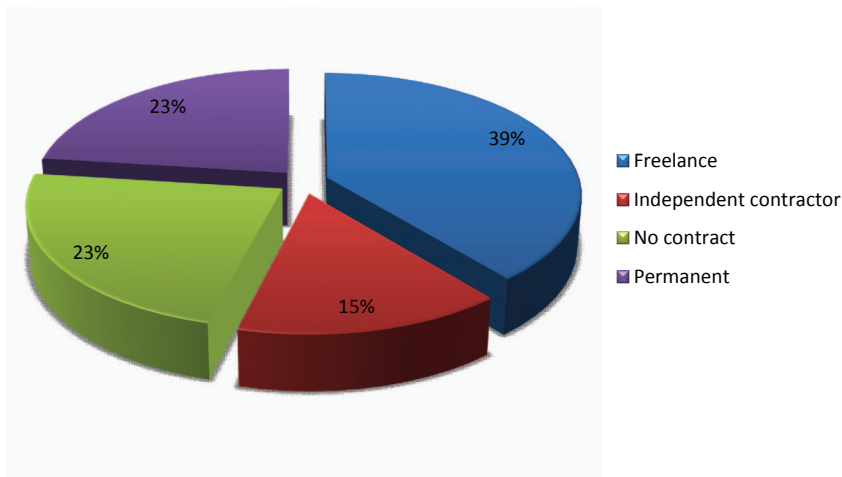|	Commercial	Documentary	Feature Film	International production	Short film	Other	Television
	10%	8%	8%	8%	20%	7%	37%

As shown in Figure 29 above, 37% of respondents indicated they have recently worked on a television production, while only 20% worked on short films.
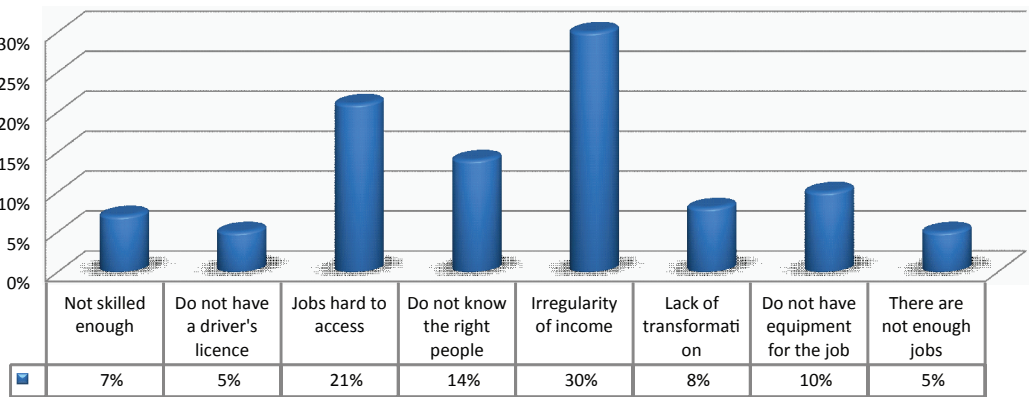
Figure 30: Type of Contract

Only 23% of the respondents had permanent contracts, 39% of respondents were free-lancers and 23% of respondents indicated they were working without a signed contract.

Accordingly, 55% of the respondents indicated that they did not own production compa-nies, while the rest (45%) claimed that they did. While similar in terms of percentages but in answer to different questions about working within and outside the film and television industry, 58% of the respondents did not work outside the industry, while the rest, 42%, said that they had other work outside of the industry.

Figure 31: Industry Challenges Encountered by Individuals

	Not skilled enough	Do not have a driver's licence	Jobs hard to access	Do not know the right people	Irregularity of income	Lack of transformation	Do not have equipment for the job	There are not enough jobs
	7%	5%	21%	14%	30%	8%	10%	5%

The most common challenge stated by respondents working in the industry was irregularity of income at 30%. 20% of the respondents indicated that even though there are jobs in the industry they are hard to access, 5% of the respondents indicated that not having a drivers licence is a challenge in the industry, while some (also at 5%) indicated that there are not enough jobs in the industry.

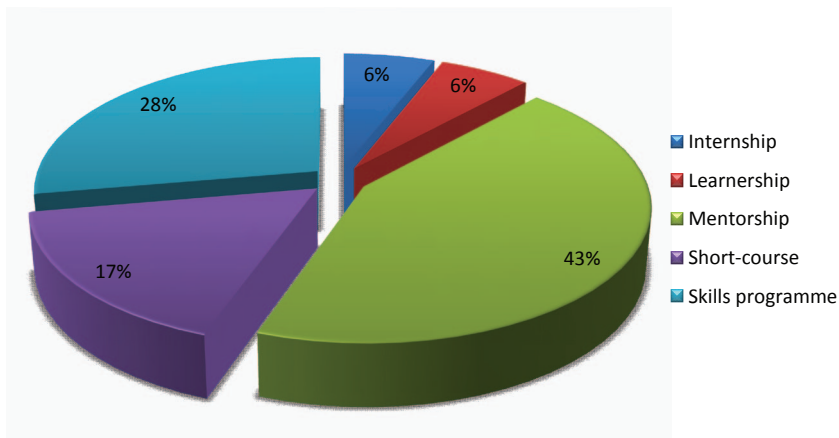**Figure 32 Types of Training Registered for in 2006**

Figure 32 above reveals that 44% of respondents received training in 2006 in the form of mentorship, 28% in the form of skills programmes, 17% in the form of short courses and 6% in the form of internships.

Most respondents claimed that their employers or companies paid for their studies. Almost all the others had bursaries or had funded themselves. Only a very small number studied through loans.

When asked why they chose specific courses, the reasons the respondents gave were that the course was free, that they approved of the quality of the course content or that it was because of the reputation of the institution they chose. It transpired that more students claimed to have received or gained on the creative skills side, from what they had studied. The next largest group said that their gains had been skills of a technical nature. A smaller group seemed to have gained project management skills but quite a significant number of respondents mentioned gaining inter-personal, organisational and technological skills.

4.6.5   Perceptions on Training Received by Respondents

Table 19: Respondents' Views Regarding Training Received

	Respondents' Views			
	Strongly Agree	**Agree**	**Neutral**	**Disagree**
Good balance between theory and practical work?	28%	11%	50%	11%
Curriculum matched what was advertised?	28%	17%	50%	6%
Training institute well-equipped?	17%	44%	28%	11%
Fees affordable?	22%	17%	50%	11%
Able to use skills learned?	28%	33%	39%	0%
Course content relevant to the industry?	33%	11%	50%	6%

Table 19 above shows respondents' views on the training they received. When asked whether there was a good balance between theory and practical work in the training they have received, 50% of the respondents were of the neutral view, 28% strongly agreed and 11% agreed that there was good balance between theory and practical work on the training they received.

All respondents were, to varying degrees, of the view that they were able to use the skills they learned in the training they received. While 6% of the respondents responded that the course content of the training they received was not relevant to the industry, 33% strongly agreed and 11% agreed that the course content was relevant to the industry.

Figure 33: Reasons for Not Attending Training
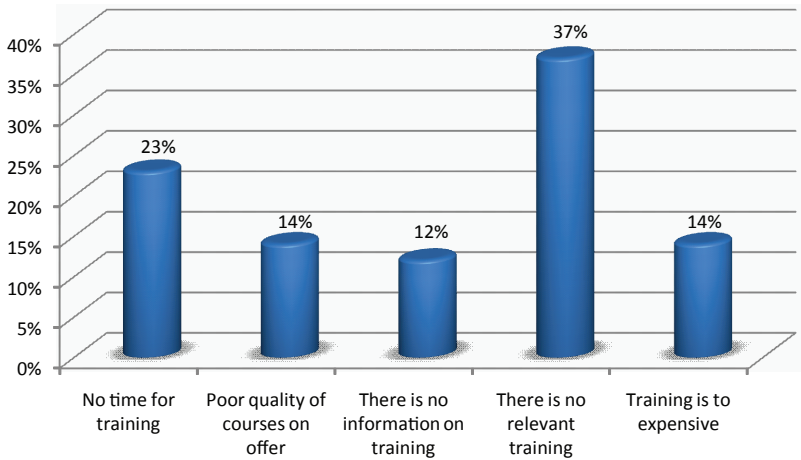
According to the respondents who had not received training in the previous year, it was because they felt there was a lack of relevant training, not having had enough time or that they thought that the courses offered were of poor quality, or that no information about training had come their way. Figure 33 above shows reasons given by respondents for not attending training.

Figure 34: What Type of Training would be Most Relevant to You?
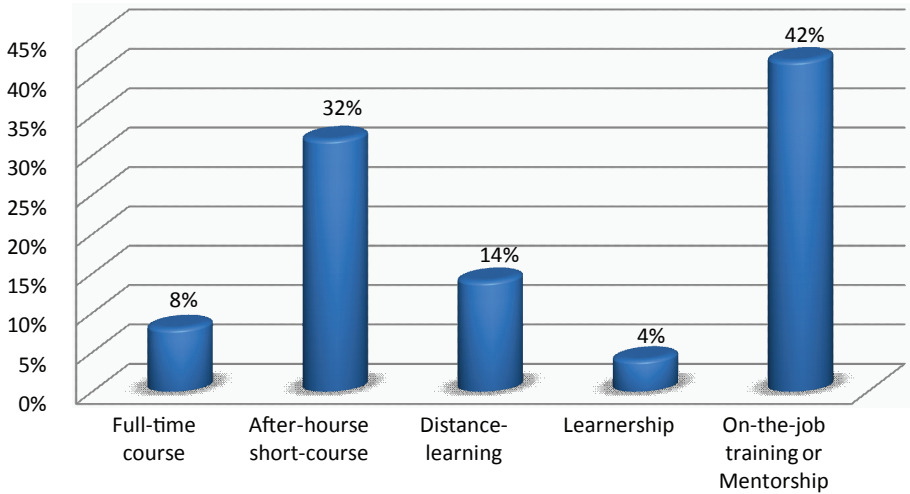
On-the-job training or mentorship would be the most relevant training. This is according to 42% of the respondents. 32% of the respondents felt that after-hours short-courses would be relevant for them. Only 4% of the respondents felt that learnerships would be a relevant training for them.

Figure 34 shows respondents' view on the type of training suitable for them. When asked to rate their skills level in their current occupation, 59% of the respondents said they have advanced skills, 24% said they have intermediate skills while 17% said they have basic skills.
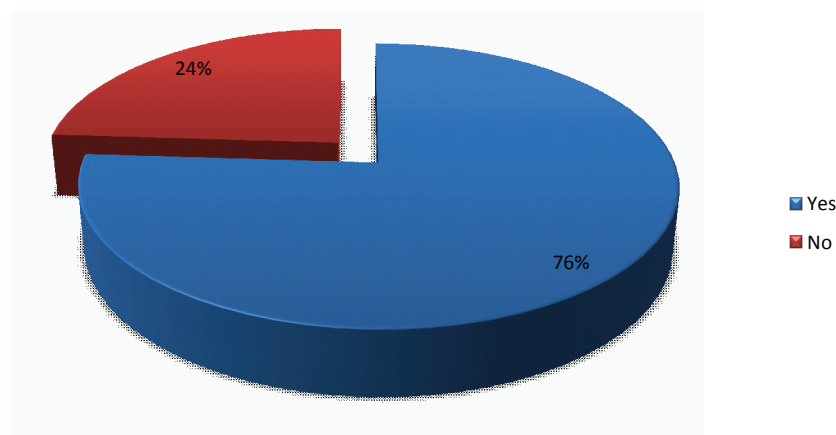
4.7 Views about a National Film School

This section provides responses from individual and company respondents on the establishment of a National Film School.

4.7.1 Companies

When asked if they think there should be a National Film School, 76% of the respondents agreed while only 24% where against the establishment of National Film School. Figure 35 below shows the responses from participants.

**Figure 35: Views on the Establishment of a National Film School**

Of those respondents that were of the view that there should be a National Film School, 80% of them indicated they have skills problems in their company. Table 20 below shows views of respondents on the establishment of National Film School by the level of skills problems in their companies.

Table 20: Views on the Establishment of a National Film School

Do you think there should be a National Film School?	Which statement best reflects the skills problems in your company	Percentage
No		**24%**
	Have serious skills problems in my company	2%
	Have some skills problems in my company	16%
	Do not have skills problems in my company	6%
Yes		**76%**
	Have serious skills problems in my company	6%
	Have some skills problems in my company	55%
	Do not have skills problems in my company	15%

Figure 36: Support for the Establishment of a National Film School
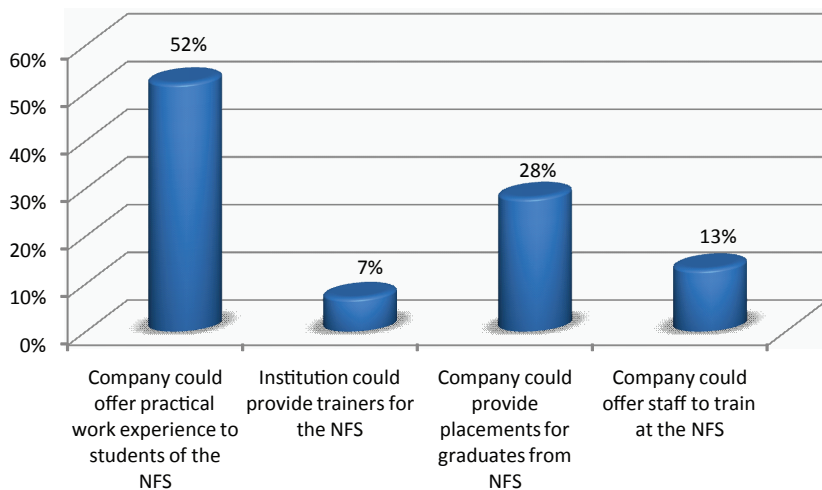
Exactly 52% of the companies that responded agreed that there ought to be a National Film School and indicated that they could offer practical work experience to students from the National Film School. Figure 36 above shows different support that respondents will offer to the National Film School.

Table 21: Reasons for Supporting the Establishment of a National Film School

Reasons for Supporting National Film School	Percentage
Conducts lessons in at least one indigenous language	4%
Has a curriculum that offers highly practical component	13%
Has trainers who have film and television experience	19%
Has state of the art equipment	14%
Produces graduates who have practical experience	12%
Has an Afrocentric curriculum	4%
Has links with the international film community	14%
Offers post-graduate training	10%
Is heavily subsidised	7%
Is located in the same city as my business	3%
Grand Total	**100%**

As shown in Table 21 above, 19% of the respondents stated that they would support a National Film School that has trainers who have film and television experience, while 3% of the respondents stated that they would support a National Film School that is located in the same city as their business.

Of the respondents that were of the view that there should not be a National Film School, 28% stated that filmmakers need experience not training, 23% indicated that government should provide more funding for production and also that there is too much entry-level training taking place, and 17% indicated that there is too much training taking place already. Figure 37 below shows respondents' reasons for not supporting the establishment of National Film School.

Figure 37: Reasons Against the Establishment of a National Film School
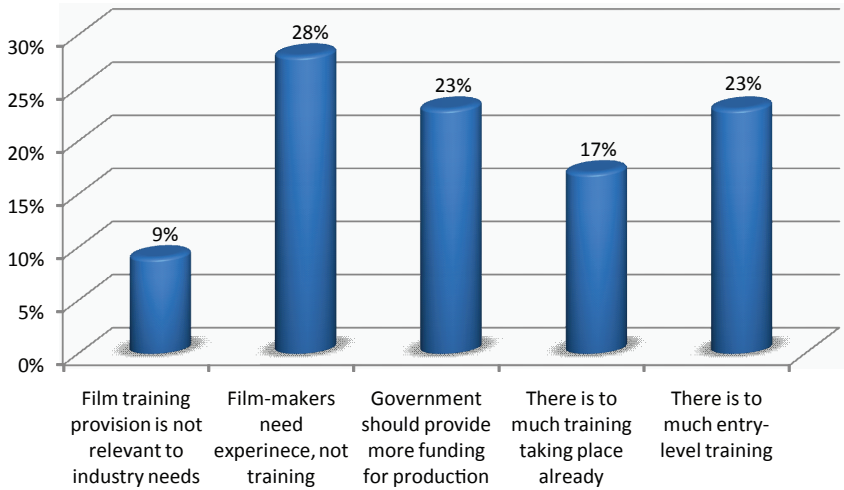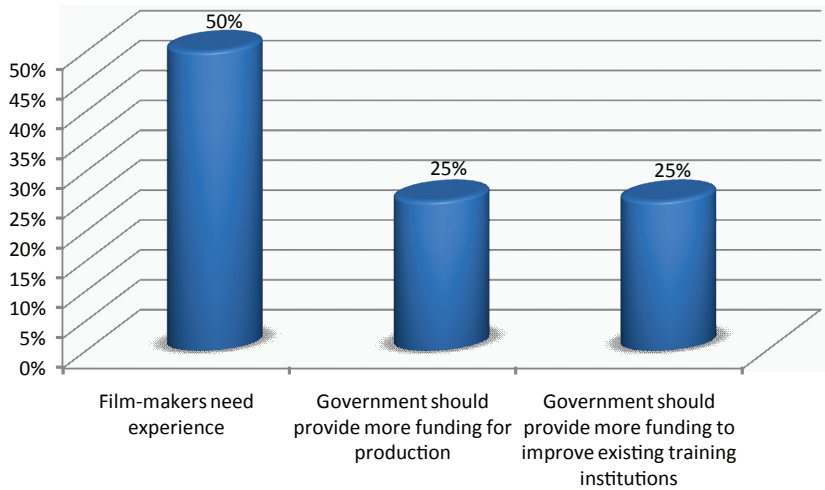

4.7.2   Individuals in Support of a National Film School

A convincing 91% of the respondents were in favour of the establishment of a National Film School, while 9% were against the establishment of a National Film School.

A clear majority of the respondents were of the view that, for them to support a National Film School, it should have links with the international community, should have a curriculum that would offer highly practical education and/or include trainers who were themselves experienced in film and television.

Figure 38: Reasons for Not Supporting a National Film School

Of the remaining 9% of the respondents that were not in support of a National Film School, 50% of them were of the view that filmmakers needed experience not training, 25% of them were of the view that government should provide more funding for production and the other 25% were of the view that government should provide more funding to improve existing training institutions instead of establishing a new school.

4.8 Occupational Descriptions

In the South African film and television industry, occupational descriptions are hardly standardised. Despite the existence of some occupational descriptions that are comparable with international standards and are seen as definite reference points, local job descriptions often vary from production to production and from one work environment to another.

Although there are several standardised occupation descriptions that are recognised by training institutions and the industry, when it comes to reality, they prove too rigid and not entirely relevant to the practicalities of the film and television industry. Some argue that the inability of the industry to unite and agree on these standards and to enforce them contributes to skills deficiencies. Others argue that using standardised descriptions of occupations and skills in a fragmented and far from homogeneous industry is ineffective.

For instance, a producer can have different skills requirements, according to genre, budget, and production value or production company. A producer working on a studio-based actuality show has different requirements from a producer working on a studio-based sitcom. Similarly, a producer working on a studio-based drama series has different requirements from a producer for working on a location-based drama series.

Although this applies to most occupations throughout the industry, the title of Producer is particularly contended between those with years of experience and new entrants to the industry. Younger producers are perceived to be calling themselves "producers" unjustifiably and maybe demanding rates that match the title when they have only produced one show or merely studied producing at a training institution. Older, more experienced producers, on the other hand, are seen to be more deserving of the title and the fee that comes with it because of their years of experience and the variety of productions on which they have worked.

Similarly, the title of Director of Photography (DOP) is contentious, especially in relation to camera operators who call themselves DOPs and demand matching rates, without the relevant creative and technical skills and experience. Scriptwriters who write for soap operas are often regarded as inadequately skilled to write for drama series. So too, the scriptwriters who write for drama series are not thought adequately skilled to write feature films.

4.9. Creating a Career Path

The inconsistent nature of the industry and the scramble for work, often any work, makes it difficult to plan a career path. The survivalist nature of working as a practitioner in this industry requires a constant search for the next job as the current production wraps. The next job is not necessarily one that advances the practitioner's career, but one that could pay the bills until a better job comes along. Therefore it is difficult to map out a clear career path for any occupation, owing to the unstable nature of employment in this sector.

This also contributes to the practice of hopping from job to job in search of a pay cheque. In so doing, practitioners remain in the same position for a long period of time, because very little upskilling takes place. The random nature of the industry does not allow practitioners to stay in one company, hone their skill and advance to the next career level. Instead, different companies hire the same practitioners over and over again, based on what they have proved able to do. Their work experience often spans several occupations, increasing the chances of employability. Although this can be viewed as a dilution of skills, some see it as a good, solid grasp of the entire production business and the ability to work as more than a mere employee in the industry.

Practitioners that stay with the larger companies that have effective skills development programmes in place are able to acquire new skills on-the-job and take up higher-level positions within the company. So, they become experienced in their "new occupations" and are able to sell themselves and demand more competitive rates. The only remaining threat here is that of losing skilled personnel to competitors that may offer better rates.

New graduates who are able to enter the industry are often frustrated by being stuck in the same position for a long period without being able to do what they studied or to fulfil their aspirations. It is also unclear how new entrants can move up from entry-level positions to more highly skilled positions. Older, more experienced practitioners often feel that younger practitioners expect to move too quickly up the rungs of the industry, when they have not shown enough commitment or worked for enough time as lower-skilled practitioners in the industry.

Younger practitioners are so eager to upskill, to work in higher positions and earn more money that it often leads (as mentioned in the previous section) to inadequately experienced practitioners prematurely demanding higher positions and pay. Although this might be the case for some, other respondents argue that older practitioners are threatened by "new blood" and are reluctant to accept younger practitioners' career advancements because of possibly losing their jobs to them. In an environment where highly skilled jobs are not easy to come by, this argument cannot be disregarded.

4.10 Conclusion

This section was a means of determining whether there is a strong or weak correlation between formal education and workplace readiness, and to determine, with some accuracy, the factors affecting the movements of the labour force and the associated trends they follow.

From the responses that were received and the supporting discussions above, it cannot be denied that there is a high demand for experienced, well skilled personnel across the board; more so from the previously disadvantaged groups which are not adequately represented in the sector. Among the skills that were sought and hence pivotal to effectiveness in film and television productions were: financial management, communication skills, project management and film financing methods. This in itself forms part of the reasons that make it hard for many practitioners to work on big productions. It is also agreed that working on such big productions is what offers the most valuable experience, yet the scarcity of big budget productions would see the local industry drastically losing competitive advantage in the skills that practitioners would gain in this field of work.

It would appear that there exists a trade-off between hiring and training inexperienced-yet-qualified personnel and working with more reputable and experienced personnel. Graduates are considered to be high risk factors as they are more prone to job-hop in the search for higher salaries and faster growth opportunities than older, more experienced personnel. The effect of this is a decreasing growth in the sector's skills base and the overall advancement to high quality and innovative productions. The length of time to develop specialised professions increases and labour productivity will itself slow down.

Another point of understanding was that graduates need to be mentored into their respective fields of interest in order to insure that the necessary skills are transferred. This too will need to be coordinated as there is a concern over individuals not following proper mentoring methods and skills transfer processes which ultimately add no value to the graduates' career objectives and growth. Coordination would also make it easier to ensure that all individuals are given equal opportunity and access to work and the experience that comes with it. It is therefore important that the learning and mentoring programme meet the industry needs and offer adequate exposure to the line of work that the graduate will one day take up. Programmes such as SEDIBA, offer only a glimpse of the successes

that stand to be gained if such initiatives are extended to the rest of the industry. It also shows how intervention can and does have positive outcomes. Some respondents felt that opportunities for new graduates exist but graduates' expectations are too high. They expect that their qualifications will open doors for high salaries and management positions and are therefore not willing to start at the bottom or stay in the same position long enough to be seasoned specialists in their respective fields.

The challenges of the local film and television industry echoed a vivid need for some form of standardisation and coordination. The outcomes of which should lead to there being a self-sustaining skilful and innovative labour force in the film and television sector.

Chapter 5:
Conclusion and Recommendations

The purpose of this study has been to investigate the feasibility of establishing a National Film School for South Africa as required by the NFVF Act. The previous chapters explored a number of legislations and government policies that apply to the film and video industries (content industries) and how this sector can be utilised as a vehicle to achieve government objectives of job creation, economic growth and redressing the imbalances of the past. While the brief has been specific to the investigation of the feasibility of establishing a National Film School, the NFVF has extended the scope of the study to lead towards a strategy for the National Film Education and Training in South Africa.

South Africa has one of the most progressive constitutions in the world. Further, a number of policies have been developed by government to ensure creative and artistic freedom. The advent of the information economy presents a number of opportunities for the creative industries. Government has been able to respond with the development of policies such as JIPSA, CIGS, the Micro Reform Strategy, the Content Industries Strategy and ASGISA that recognise the potential growth of the creative industries and contribution to job creation and economic development. The major challenge remains that of policy implementation. Despite the successes of some South African films internationally between 2003 and 2006, the sustainability of government programmes and initiatives remains a huge challenge.

Globalisation and the influx of foreign content have necessitated that most countries introduce measures to preserve local culture and content. ICASA, through local content quotas, ensures that the South African broadcasting system preserves local programming by complying with the relevant quotas as prescribed in their licences. This move has been instrumental in providing a space for diverse voices that were previously unheard, as well as creative and artistic freedom.

The South African government has also entered into cooperation agreements that enable South African producers to collaborate with international counterparts. Audiovisual co-production treaties enable producers collaborating under such arrangements to raise finance and share markets and use financial incentives afforded to national films in each co-producers country. However, South African producers are still recipients of such projects and not many producers have the skill to operate and put together deals and structures that are sometimes complex under such arrangements. Such scenarios compromise creative control, which is vital in such arrangements. The outcome is that more often than not, the projects do not truly reflect South African stories and for this reason they usually do not attract a wide audience.

With the existence of institutions such as the NFVF, DTI and DAC and provincial institutions, government support and intervention in this area has managed to bring change and facilitate the participation of previously disadvantaged communities and individuals in the narration of South African stories. Despite some of the achievements, much needs to be done to ensure that new businesses and entrepreneurship flourishes.

The content industries are yet to take their rightful place in South African society and the economy. While there are still challenges in measuring the economic contribution of this industry to the gross domestic product, there is recognition that film straddles the economic and social clusters of government. The major challenge remains the inability to account for film contribution to the economy in the national account due to straddling of the personal and social services, hospitality and transport, storage and communications sectors according to SIC.

South Africa is a sought-after film location and has 'stories to tell' which can resonate with international audiences. The popularity of South Africa as a filming location highlights the technical capabilities of local crew and technicians. The launch of the production rebate scheme is meant as an incentive to attract large-budget foreign productions to shoot in South Africa as administered by the DTI. The major challenge

remains with local productions, especially the low production volumes that impact on the ability of the industry to provide sustainable jobs for industry practitioners as well as prospective graduates who have completed studies in film and television.

The distribution and exhibition of film products remains largely skewed in South Africa. The majority of South Africans remain excluded from accessing such facilities as they are concentrated in the suburbs. Township cinemas that flourished in the 1980s have since closed down, leaving the concentration of cinemas in the main city centres. South African films still struggle to make money at the box office while Hollywood blockbusters and a few local films are able to attract a number of audiences to break-even, but not often make significant profits. The challenge this brings is the distribution model that operates on the basis that a film should be able to recoup its costs locally.

Television content, on the other hand, has proved to be popular with South Africans, especially on SABC channels. Local filmmakers and writers are yet to find a formula that will attract audiences to go to cinemas to watch their films. The exploitation of other revenue streams such as DVD sales is constrained and crippled by piracy, which is a global challenge. Some films are released on pirated DVDs before theatrical release, which impacts negatively on how these films perform at the box office and subsequent DVD sales.

The introduction of new pay TV players to compete with Dstv is another possible platform for the distribution of local films. It remains to be seen how the introduction of new players will change the landscape by offering consumers more options.

The rollout of digital terrestrial television is anticipated to free up the frequency spectrum for more channels. The opportunity for content producers is the increased demand for local programming. This will also see broadcasters commissioning procedures and practices with the independent production sector on the procurement and commissioning of local content under the spotlight. ICASA, industry organisations and broadcasters will need to work out the commissioning practices to benefit both parties and grow the industry.

Despite the challenges encountered during the study, the literature review as well as the questionnaire administered has been useful in revealing the state of training and education in the sector as well as some of the gaps that exist from a skills and expertise perspective.
The study indicates that there is a high level of job instability in the industry. Most practitioners are employed on a contractual basis while the majority of the industry operates on a freelance basis. Foreign productions provide job opportunities for experienced filmmakers. A limited number of local production companies share the bulk of servicing deals.

There has been a number of emerging, young black filmmakers who bring new talent and voices to South African filmmaking. Support is required from government to nurture and grow this talent through intervention at enterprise development and the provision of platforms to showcase their talents and products.

The company survey indicates a few disparities in relation to workplace training. While most companies indicated that they have experienced some shortage of skills, their attitude towards training seems to be varied and specific to the needs of a particular company, or training is initiated in response to specific projects.

A number of skills development initiatives such as on-the-job training, mentorship, and learnerships have been introduced. The challenge is finding ways to ensure that graduates who undergo such training initiatives are skilled and employed. The role of the MAPPP SETA needs to be asserted with support from other institutions such as the NFVF, DTI and training institutions. A clear-cut career path in the industry remains a challenge.

The curricula implications are an important factor in graduate employment, as well as clearer career mapping. This is especially significant in South Africa where graduates are either too technical or theory based, with gaps regarding practical experience relevant to the industry. More so, the current landscape indicated in the company survey, requires a graduate who has a balance of practical as well as theoretical experience.

Individuals and companies respondents' views regarding the establishment of a National Film School yielded identical responses. While there are different reasons for supporting the establishment of a National Film School, the majority of both groups support it. Companies' respondents support the establishment on reasons that are similar to some of the findings of this study. For instance, some of the company respondents have indicated that they'd support such a school if trainers have film and television experience, state-of-the-art equipment, graduates with practical experience and links with the international community.

Other reasons mentioned for supporting the establishment of the National Film School are the current inapt job skills and the lack of knowledge of the financial and communication aspects of the film business. Evidently, the current education system does not address these needs and is, therefore, perpetuating this condition. In a comparative look at foreign films schools like AFTRS, NFTS, AFI, etc., it becomes apparent how those schools, financially supported by government and the private sector, actually benefit those countries' film education and training, hence the film industry itself by aligning the education of film and TV professionals with the industry's needs in mind.

5.1   Recommendations

The current educational provision does not adequately equip graduates with the necessary skills required by employers when entering the industry. At the same time, technology is changing so rapidly that there is a constant need for formal training that meets the skills requirements of the industry. The establishment of a National Film School is recommended to remedy some of the constraints identified by the report.

From the interviews that were conducted with some industry practitioners and professionals, [113] it is apparent that the local education system has not been able to supply the industry with the quality of professionals that are required. The local education system still needs to be placed more in line with the needs of the industry. Given the fact that most public and private institution are already operating beyond full capacity, it would be remiss to assume these needs will be met in the future without any formal intervention.

Therefore, it is strongly recommended that there be a National Film Education and Training Strategy developed specifically for the advancement of film and television education in South Africa, from which a National Film School can be established.

Most of the countries with sustainable film industries have national film schools that are government-funded and established with the rationale of preserving their culture. A similar approach could inspire the South African film and television industry and elevate it to its maximum potential.

If established, the national film school should initially be wholly government funded. The DAC and DTI needs to play a critical role in this area.

The school should be located in Gauteng and specifically Johannesburg, where there is a high concentration of film activity, and needs to have a governing body where all stakeholders like the Council for Higher Education are represented for quality assurance purposes. [114] It must also be accredited as a Higher Education Institution.

---

[113] Section 4 of this document.
[114] Botha M.

The school should further admit students on academic excellence and passion to be in the industry, while taking their financial needs into consideration.

As one of the weakness of the current institutions is enrolling a high number of learners, the school should admit a small number of students to ensure that there is individual attention and optimal time for the use of school equipment.

The school should establish strong links with the industry which will open opportunities of employment for graduates, and also draw lectures who are experts in their fields from the industry. This will also ensure that mentorships and internships are properly administered. However, the school should not be seen as leaning towards certain production companies or broadcasters. For example, Lodz Film School in Poland is attached to production companies. They are selecting only a few learners, who are then placed within the industry by the time they leave the institution. A major failure of all film schools and tertiary institutions in South Africa is that they are not properly linked to the industry.

As mentioned in the report, students graduate with different basics, which necessitates that the schools adopt a curriculum that emphasises both theoretical and practical aspects of training. It should offer a curriculum that will make the students specialists who are well trained in narratives and aesthetics. [115]

Finally, the school should have links with international bodies such as CILECT, which is an umbrella of film schools all over the world; this will help the school stay up-to-date with international best practice and new teaching methods while at the same time allowing the school the prospect to establish opportunities for academic exchange programmes.

[115] Ibid 109.

Papers, Books and Reports

Armstrong, C and Ford, H (2007). Innovations in Licensing Rights & Copyright for digitized, sustainable film distribution in South Africa.

Blom, R and Keevy J (). The impact of the implementation of the National Qualifications Framework on Education and Training in South Africa.

Botha, M (2004). The Struggle for a South African Film Audience.

Botha, M (1998). The cinema of Manie Van Rensburg popular memories of Afrikanerdom Part 2.

Botha, M () Vibrant cultures in Latin America.

Cape Film Commission, 2006 Strategic Analysis of the Cape Town and Western Cape.

De Beer, Adam (2005) Lights, Camera, Lesson plan: higher education programme design in the film and media environment. MA thesis.

Dearham, M (2001). Film and democracy in South Africa.

Department of Trade and Industry: (2002) A guide to the microeconomic reform strategy: A discussion paper from the DTI of South Africa.

Department of Trade and Industry: (2007) Strategic plans, legislation and budget 2007/8. Trade and Industry Portfolio Committee.

Dewson et al (2000). Guide to measuring soft outcomes and distance travelled, IES, DFEE.

ICASA (2000). Discussion paper on the review of local content quotas.

JIPSA annual Report 2006.

Joffe, A. (2005).

Luckett, K (2005). A critical policy analysis of the proposed National Quality Assurance System for South African Higher education, In HESA (Eds). *The Decade Ahead: Quality Assurance in South African Higher Education.*

Rony, FT (1996). The third eye: Race, cinema and earthnographic spectacle.

Shepperson, A and Tomaselli, K (1997). South African Cinema Beyond Apartheid.

White paper on Arts and Culture (1996).

Speeches /Conferences

Manuel, T (2007). Budget Speech
NFVF Indaba 2001

Articles

Screen Africa Volume 19, January 2007 "SABC formulates film policy"
CICLECT Newsletter October 2007

Acts

Copyright Act No 98 of 1978
Electronic Communications Act No 36 of 2006
Films and Publications Act No 65 of 1996
Higher Education Act No 101 of 1997
Independent Communications Authority of South Africa Act No 13 of 2000
National Film and Video Foundation Act of No 73 of 1997
Skills Development Act No 97 of 1998
Constitution of the Republic of South Africa Act No 108 of 1996

Websites

www.binger.nl / www.cfc.co.za
www.cinema.usc.edu / www.dac.gov.za
www.dificop.wetpaint.com / www.digitalcinema2007.co.uk
www.dol.gov.za / www.durbanfilmoffices.com
www.filmmaking.net / www.filmschool.lodz.pl
www.fru.co.za / www.gfc.org.za
www.gov.za / www.idc.co.za
www.imdb.com / www.kftelevision.com
www.kinema.uwaterloo.ca / www.labour.gov.za
www.mappp-seta.co.za / www.multichoice.co.za
www.nafti.edu.gh / www.nfvf.co.za
www.nftsfilm-television.ac.uk / www.ondigital.co.za
www.penrose-press.com / www.pmg.org.za
www.polity.org.za / www.sabinet.co.za
www.safact.co.za / www.saqa.org.za
www.telkommedia.co.za / www.ucine.edu.ar
www.umalusi.org.za

Appendices

Annexure 1: Positions that are hard to fill

Position			
Assistant Director	Production Designer	Production Accountant	Personal Assistant
Production Manager	Production Co-ordinator	Producer	Wardrobe Designer
Screenwriter	Broadcast Engineer	Video Tape Operator	Sound Mixer
Boom Swinger	Rentals Co-ordinator	Camera Engineer	Art Director
Editor	Line Producer	Scriptwriter	Accountant
Make Up Artist	Animator	Director	Wardrobe Manager
Sound Engineer	Graphic Designer	Film Underwriter	Locations Manager
Sales and Distribution Executive	Post Production Specialist	Animal Trainer	Production Assistant
Production Secretary	Floor Manager	Researcher	Sound Recordist
Wardrobe Mistress	Sparks	Grip	Runner